



Automatic Data Processing, Inc.

ADP Freedom

Employee Benefits

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Preface

What's in this guide?

Chapter 1 – Creating employee benefits

Chapter 2 – Benefit plans

Chapter 3 – Enrolling employees into benefits and benefit plans

Chapter 2 – Benefit statements

Terminology

Chapter 1 – Creating Employee Benefits

Overview

Benefit management, within ADP freedom, can be based both on individual benefits and benefit plans. Some benefits may be universal or core, that is they are available to all employees and may be assigned automatically according to the relevant rules. Each benefit may have different levels of coverage, for example Medical Insurance where an employee may elect from a basic level 1 coverage of say, **Employee Only**, or level 2 of **Family** cover.

Prior considerations

Benefit lookup tables

Prior to creating company benefits within ADP freedom, the following lookup tables should be populated with details that are relevant to the company, and to the benefits that are about to be configured. These lookup tables are specific to each individual organisation and as such are wholly maintained by the user.

- **Company > Company Setup > Lookups > Benefit Lookups > Benefit Qualifying Period.**
- **Company > Company Setup > Lookups > Benefit Lookups > Benefit Category.**
- **Company > Company Setup > Lookups > Benefit Lookups > Benefit Provider.**

For assistance in setting up the above lookup tables, refer to the on-line help.

Ensure relevant earnings and deductions are available for benefits

Only earnings and deductions that have a classification that has been designated as relevant to benefits can be attached to employee benefits.

Note: *If there are earnings and deduction classifications that you wish to be made available to benefits, in addition to the **Benefit** classification, please see your ADP representative.*

A benefit may be linked to any combination of the following payroll items that have the appropriate classification:

- Employee deduction
- Employer contribution
- Employee earnings.

Where earnings and deductions have been specifically created for benefits, or existing earnings and deductions have been configured for benefits, ensure that they have been made available to the relevant employees pay groups by **the Company > Company Setup > Deductions > Pay Group Deduction** and **Company > Company Setup > Earnings > Pay Group Earnings** pages.

Linked deductions

Some organisations make contributions to certain employee benefits that are directly related to the employee's own contributions. These are identified as linked deductions. This linkage must be configured before they can be attached to benefits.

The concept of linked deductions allows a user to link an employee deduction to an employer contribution, ensuring that they are treated as partner deductions, that is to say, whenever deduction A is processed its partner, deduction B, will also be processed.

Linked deductions are configured on the **Company > Company Setup > Deductions > Employee Deduction** page, and/or **Company > Company Setup > Deductions > Employer Contribution** page.

Note: *Linked deductions cannot to be used for pension type deductions so if the classification code is equal to either PENMAIN, PENADD or PENAVC the linked deduction field is disabled.*

Linking is a two-way affair; if deduction A is linked to B then B is linked to A. When a link is specified on deduction A it should be reflected through to deduction B. A deduction can only be linked to another deduction in the same company. A deduction cannot be linked to more than one other deduction.

The **Linked deduction** drop-down list displays all deductions of the opposite type (i.e. if this is an employee deduction ADP freedom only displays employer deductions and vice versa) that are not already linked to another deduction.

When linking deductions it is necessary to ensure that they both have the same schedule payrun settings. This will ensure they get processed in same payruns so once a link has been made, the two deductions schedule settings are compared. If these are different then ADP freedom issues a message asking the user to select the schedule that should apply.

Creating and configuring Employee benefits

Before benefits can be assigned to employees, they must first be created and configured at company level.

There are many different types of employee benefits where each type will have slightly different elements that need to be configured. However, ADP freedom has identified four basic benefit types, from which the **Benefits Assistant** provides the means to configure a full range of benefits. The four basic types of benefit from where all other benefits can be configured are:

- Standard
- Share options
- Leave plan
- Pension

Standard benefits include **Loans, Company Vehicle, Company Property, Health Plans** etc. where the information required can be captured on the **Benefit**

Chapter 1 Creating Employee Benefits

Assistants standard pages, whereas, the other three benefit types require specific details to be entered on an additional assistant page.

For example, with Share options, there may be a number of share option plans that are running concurrently where employees may be participating in some but not in others, therefore specific plans require identification.

Depending on which benefit type that is required, then the assistant presents the various options that require configuration.

To create a new employee benefit, select **Company > Benefits > New**.

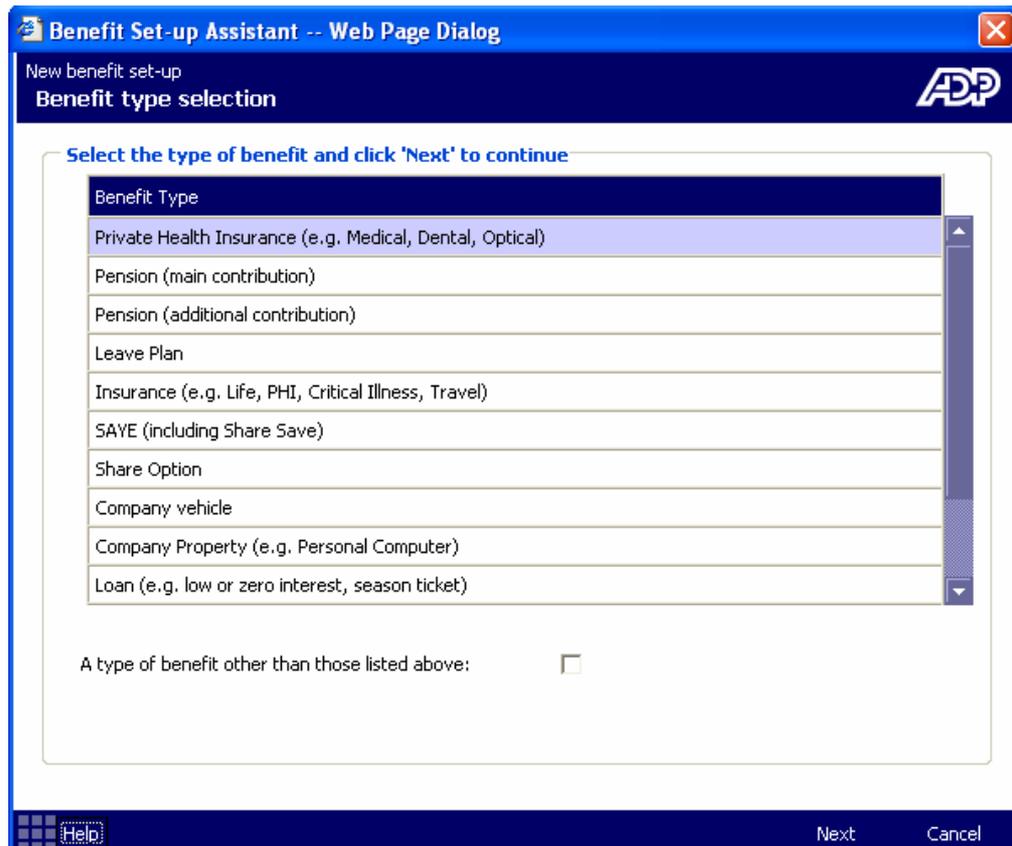


Figure 1 - 1 Benefits Setup Assistant - Select Type

Standard benefits

If, from the first page of the assistant, the type of benefit chosen is Private Health Insurance, then once **Next** is selected the assistant displays a page that has been designed to collect the relevant details for this type of benefit.

Figure 1 - 2 Benefits Setup Assistant – Benefit details

When a plan is assigned to an employee, benefits that are core in the plan are processed as automatic enrolments, that is, without further user intervention, the system automatically assigns to the employee the benefit using the default level of coverage.

For assistance in completing the fields on this page, refer to the table below:

Benefit details page field descriptions

Table 1 - 1 Field Descriptions – Benefit details

Field	Description
Benefit details	
Benefit Code	Mandatory field. This is a unique, user defined, code. The field will accept up to ten characters.
Benefit description	Mandatory field. This is a short description of the company benefit. The field will accept up to 100 characters.
Start date	Mandatory field. Enter the date that this benefit starts.
End date	The date that this benefit ended or will end. The field can be left blank if the end date is not known.
Qualification	Selected from the drop-down list, this is the period of time that the employee has to have worked for the company

period	before they are eligible for this particular benefit. Qualifying periods are configured from the Company > Company Setup > Lookups > Benefit Lookups > Benefit Qualifying Period table. <i>Note: This field is disabled for Leave benefits.</i>
Provider	Selected from the drop-down list, this is the provider of the benefit that is being configured. Benefit providers can be added to, or deleted from, the Company > Company Setup > Lookups > Benefit Lookups > Benefit provider table.
Benefit indicators	
Core benefit	Core benefits are those that are open to all employees and can be processed as automatic enrolments. If a benefit is core and automatic enrolments are used, then the system automatically assigns the benefit using the default level of coverage to every eligible employee.
Include in benefit statement	An employee benefit statement is available from the People > Employment > Benefits page. If the Include in benefit statement check-box is ticked then the associated benefit will be included in the statement for all employees who are enrolled into it.
Benefit reporting	
Short name	The short name is automatically derived from the Benefit description field but shortened, if required, to a maximum of forty characters for reporting purposes. This name can be overwritten if required but the maximum number of characters remains at forty.
Category	For reporting purposes, benefits are linked and listed by categories. These categories are user defined and can be added to or deleted from the Benefits Category lookup table that is accessed from Company > Company Setup > Lookups > Benefit Lookups .
Display sequence	For reporting purposes the display sequence is used when more than one benefit of the same category exists. In the report, benefits with lower display sequence numbers will appear before those with higher sequence numbers.

Once the required fields have been completed, clicking on the **Next** button will progress the assistant to the levels of benefit coverage.

Setting up levels of benefit coverage



Figure 1 - 3 Benefits Setup Assistant – Coverage list

A benefit coverage record is present for each level at which an employee may participate in a benefit. A typical example is Private Health Insurance where the employee may elect from say, Employee Only or Family cover.

There are at least two levels of coverage for each benefit, one level being an opt-out where eligible employees have chosen not to participate in the benefit.

Depending on whether this is a new benefit or whether the benefit is being amended in some way the user should select the relevant option. Refer to the table below for assistance in completing the page.

Coverage list field descriptions

Table 1 - 2 Field Descriptions – Coverage list

Field	Description
<p>Levels of coverage defined for this benefit</p> <p>Note: For a new benefit there will be no levels of coverage as yet defined and this grid will be empty.</p>	
<p>Enter information for the next level of coverage</p>	<p>For a benefit that is being configured within ADP freedom for the first time, it is necessary to build up the levels of coverage that are available. There should be at least two levels of coverage for each benefit, one level being an opt-</p>

Chapter 1 Creating Employee Benefits

	out where eligible employees have chosen not to participate in the benefit. For benefits that have already had levels configured, then additional levels can be added by selecting this option.
Amend the level of coverage selected above	If a benefit has previously been configured but there has been some change in one or more levels of coverage, then the level that is to be modified should be selected from the grid in the Level of coverage area of the page and this option selected. On clicking the Next button at the foot of the page the assistant will open the benefit at the coverage level that is to be amended.
Delete the level of coverage selected above	Where a level of coverage is no longer provided for this benefit then the relevant level should be selected from the grid in the Level of coverage area of the page and this option selected. On clicking the Next button at the foot of the page the assistant will issue a confirmation message to ensure that you really wish to delete this level, on selecting OK , the assistant will delete the level.
I've finished entering details for all levels of coverage for this benefit	This option should be selected when all levels of coverage have been configured as required for this benefit. Then, on selecting the Next button will progress the assistant to the non-participation page where the user can select various options of what to do where eligible employees do not want to participate in the benefit scheme.

Configuring coverage levels

Once the user has elected to configure a level of coverage for the benefit, the **Benefit Assistant** needs to establish whether there are any employee or employer costs associated with this particular level.

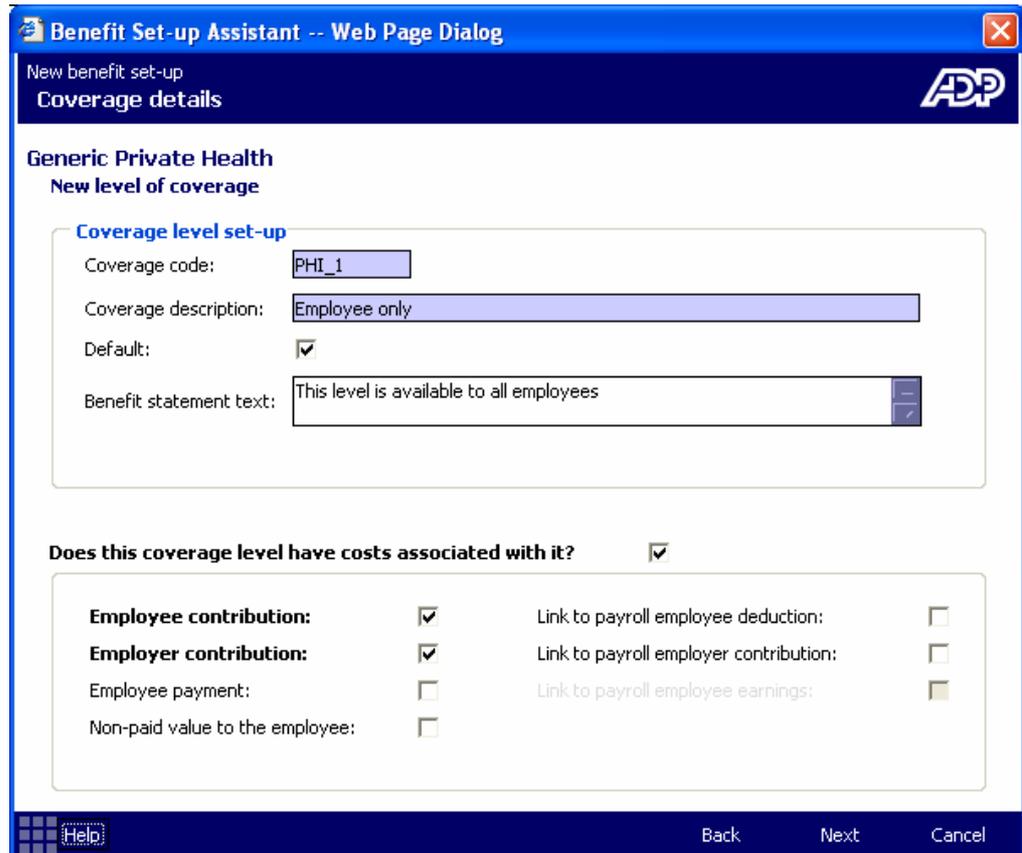


Figure 1 - 4 Benefits Setup Assistant – Coverage Levels

Each coverage level may have its own set of costs associated with it. These costs are used to drive the creation and ongoing maintenance of employee benefit and related employee deduction and employee earnings records.

Coverage details field descriptions

Table 1 - 3 Field Descriptions – Coverage details

Field	Description
Coverage level set-up	
Coverage code	A unique user defined code that is used to identify this benefit coverage within ADP freedom. The code can be up to ten alpha numeric characters.
Coverage description	This is a free form text field where the user can add a comprehensive description of the coverage, if required. The field will accept up to 100 alpha numeric characters.
Default	Where a benefit has been defined as Core , then one coverage level must be identified as the Default level. Core benefits are those that are open to all employees and can be processed as automatic enrolments. If a benefit is Core , then the system automatically assigns the benefit using the Default level of coverage to every eligible employee.

	<p>Note: <i>Only core benefits can have a default level, and there can only be one default level for a core benefit.</i></p>
Benefit statement text	<p>This field allows the user to specify the text that appears on the employee benefit statement in relation to this coverage level for this benefit.</p>
Coverage amount	<p>This field will only be visible for benefit types of Loan and Other, where goal amounts can be set. Where benefit is Loan and the coverage level does involve a goal amount, for example a recovery amount of £2000 on a loan, then this amount will automatically appear as the Goal on the Employee contribution page for this coverage level.</p> <p>For a benefit type of Other, contributions might be paid by both employee and employer, so the Coverage amount is not transferred to the contribution pages and it is up to the user to enter the goals for both.</p>
<p>Does this coverage level have contributions or payments associated with it?</p>	
Employee contribution	<p>If the employee is required to contribute towards this level of coverage for this benefit then this check-box should be selected.</p> <p>Note: <i>This box is only enabled when the user has confirmed that there are costs associated to this level of coverage by having selected the Does this coverage level have contributions or payments associated with it? check-box.</i></p>
Link to payroll employee deduction	<p>If the employee coverage costs are to taken automatically by being linked to a payroll deduction then this check-box should be selected.</p> <p>Note 1: <i>This box is only enabled when the user has confirmed that there are costs associated to this level of coverage by having selected the Does this coverage level have costs associated with it? check-box, and having confirmed that the employee is liable to make contributions by selecting the Employee contribution check-box.</i></p> <p>Note 2: <i>The relevant benefit deduction should have already been set up on the Company > Company Setup > Deductions > Employee Deduction page.</i></p>
Employer contribution	<p>If the employer has agreed to contribute towards this level of coverage for this benefit then this check-box should be selected.</p> <p>Note: <i>This box is only enabled when the user has confirmed that there are costs associated to this level of coverage by having selected the Does this coverage level have</i></p>

	<p><i>contributions or payments associated with it? check-box.</i></p>
<p>Link to payroll employer contribution</p>	<p>If the employer coverage costs are to taken automatically by being linked to a payroll deduction then this check-box should be selected.</p> <p>Note 1: <i>This box is only enabled when the user has confirmed that there are costs associated to this level of coverage by having selected the Does this coverage level have costs associated with it? check-box, and having confirmed that the employer is liable to make contributions by selecting the Employer contribution check-box.</i></p> <p>Note 2: <i>The relevant benefit deduction should have already been set up on the Company > Company Setup > Deductions > Employer Contributions page.</i></p>
<p>Employee payment</p>	<p>If the benefit coverage involves payment to the employee then this check-box should be selected.</p> <p>Note: <i>This box is only enabled when the user has confirmed that there are costs associated to this level of coverage by having selected the Does this coverage level have contributions or payments associated with it? check-box.</i></p>
<p>Link to payroll employee earnings</p>	<p>If the employee coverage payments are to be paid automatically by being linked to a payroll earning then this check-box should be selected.</p> <p>Note 1: <i>This box is only enabled when the user has confirmed that there are costs associated to this level of coverage by having selected the Does this coverage level have contributions or payments associated with it? check-box, and having confirmed that the employee is due payments, by selecting the Employee payment check-box.</i></p> <p>Note 2: <i>The relevant benefit earning should have already been set up on the Company > Company Setup > Earnings > Employee Definition page.</i></p>
<p>Non-paid value to employee</p>	<p>If the benefit coverage is of the kind that will not appear on the employee’s payslip, but does have a monetary value, such as a company health insurance that the employee is not required to pay into, then this benefit coverage will have tax implications and should be identified here by selecting this check-box.</p> <p>When the Employee Benefit Report or Benefit Statement is viewed, these types of benefit will be identified by an accompanying asterisk.</p> <p>Note: <i>This sort of benefit would usually be detailed on the</i></p>

	<i>employee's Form P11d.</i>
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Once the required fields have been completed, clicking on the **Next** button will either return the assistant to **the Coverage List** where the user has the option of setting up further levels of coverage for this benefit, or, where the user has identified that there are costs associated with this benefit, the assistant will open the pages required to configure the relevant costs. For example, where the coverage level consists of **Employee contributions**, then the assistant will open a page where the user can set up the employee deduction.

Setting up employee contributions

Figure 1 - 5 BenefitsSetup Assistant – Employee contributions

Note: Only deductions that have previously been configured as available for benefits will be displayed here. If the deduction that you wish to associate with this benefit does not appear, contact your ADP representative.

Employee Contribution field descriptions

Table 1 - 4 Field Descriptions – Employee contributions

Field	Description
Employee contribution defaults	
Amount	This is the default amount for this coverage level that will automatically be applied if not overridden at employee level from the People > Employment > Benefits page. The

	amount is used in conjunction with the Frequency field.
Frequency	This field defines how often the deduction is made, used in conjunction with the Amount field. Both the amount and frequency can be overridden at Employee level.
Percentage	<p>If a percentage of an employee’s income is to be contributed to this benefit coverage level then the relevant percentage number should be entered here. This can be overridden at employee level if required.</p> <p><i>Note: If a percentage based deduction is to be applied then the user must specify the employee earnings that will be taken into account when calculating this percentage. Eligible earnings for percentage based deductions are identified on the Company > Company Setup > Deductions > Eligible Earnings page.</i></p>
Goal	<p>This field will specify any maximum amount that can be contributed by the employee for this benefit coverage level. The amount of the contribution will be accumulated each pay period, into the next calendar year, if necessary, until the goal is met, then the contributions will stop.</p> <p>If the benefit was in the form of a loan, then by default the loan amount to be recovered, initially entered on the coverage details page, will be entered here.</p>
Available payroll deductions	
Company	<p>This is the company for which the benefit deduction is being configured.</p> <p><i>Note: In most cases there may be only one company to choose from.</i></p>
Deduction	<p>This is the deduction that has been configured for use with benefits.</p> <p><i>Note: If the deduction that you wish to use does not appear in the grid then it may not have been configured for use with benefits. Contact your ADP representative.</i></p>

Where the coverage level consists of **Employer contributions**, then the assistant will open a page where the user can set up the employer contribution.

Setting up employer contributions

The screenshot shows a web browser window titled "New Benefit Assistant -- Web Page Dialog". The page content includes:

- Header: "New benefit set-up" and "Employer contribution" with the ADP logo.
- Section: "Benefit Private Health" and "First Level Coverage".
- Section: "Employer contribution" containing:
 - "Employer contribution defaults" box with fields for:
 - Amount (£): 25.00
 - Frequency: Monthly (dropdown menu)
 - Percentage: (empty field)
 - Goal (£): (empty field)
- Table: "Available payroll contributions"

<input type="checkbox"/>	Company	Contribution
<input type="checkbox"/>	Bond Enterprise	Linked deduction to Share Options
<input type="checkbox"/>	Bond Enterprise	Pension linked contribution
<input checked="" type="checkbox"/>	Endless Adventures Ltd	Linked for Health Benefits
- Footer: "Help", "Back", "Next", "Cancel" buttons.

Figure 1 - 6 BenefitsSetup Assistant – Employer contributions

Note: Only contributions that have previously been configured as available for benefits will be displayed here. If the deduction that you wish to associate with this benefit does not appear, contact your ADP representative.

Employer Contribution field descriptions

Table 1 - 5 Field Descriptions – Employer contributions

Field	Description
Employer contribution defaults	
Amount	This is the default amount for this coverage level that will automatically be applied if not overridden at employee level from the People > Employment > Benefits page. The amount is used in conjunction with the Frequency field.
Frequency	This field defines how often the deduction is made, used in conjunction with the Amount field. Both the amount and frequency can be overridden at Employee level.
Percentage	If a percentage of an employee’s income is to be contributed to this benefit coverage level then the relevant percentage number should be entered here. This can be

	<p>overridden at employee level if required.</p> <p><i>Note: If a percentage based deduction is to be applied then the user must specify the employee earnings that will be taken into account when calculating this percentage. Eligible earnings for percentage based deductions are identified on the Company > Company Setup > Deductions > Eligible Earnings page.</i></p>
Goal	<p>This field will specify any maximum amount that can be contributed by the employer for this benefit coverage level. The amount of the contribution will be accumulated each pay period, into the next calendar year, if necessary, until the goal is met, then the contributions will stop.</p>
Available payroll deductions	
Company	<p>This is the company for which the benefit deduction is being configured.</p> <p><i>Note: In most cases there may be only one company to choose from.</i></p>
Deduction	<p>This is the deduction that has been configured for use with benefits.</p> <p><i>Note: If the deduction that you wish to use does not appear in the grid then it may not have been configured for use with benefits. Contact your ADP representative.</i></p>

Where the coverage level consists of **Employee payments**, then the assistant will open a page where the user can set up the employee payments.

Setting up employee payment

Figure 1 - 7 BenefitsSetup Assistant – Employee payment

Note: Only earnings that have previously been configured as available for benefits (usually with a classification of *Benefit*, but could be other classifications if requested) on the **Company > Company setup > Earnings > Earnings Definition** page, will be displayed here. If the earning that you wish to associate with this benefit does not appear, contact your ADP representative.

Employee payment field descriptions

Table 1 - 6 Field Descriptions – Employee payment

Field	Description
Employer payment defaults	
Amount	This is the default amount for this coverage level that will automatically be applied if not overridden at employee level from the People > Employment > Benefits page. The amount is used in conjunction with the Frequency field.
Frequency	This field defines how often the earning is paid, used in conjunction with the Amount field. Both the amount and frequency can be overridden at Employee level.

Available payroll deductions	
Company	This is the company for which the benefit earning is being configured. <i>Note: In most cases there may be only one company to choose from.</i>
Earnings	This is the earning that has been configured for use with benefits. <i>Note: If the earning that you wish to use does not appear in the grid then it may not have been configured for use with benefits. Contact your ADP representative.</i>

Setting up non-paid value defaults

If the coverage level is a non-paid value, such as a company paid health insurance, then the default values should be set up here.

The screenshot shows a web browser window titled "New Benefit Assistant -- Web Page Dialog". The page content includes:

- Header: "New benefit set-up Value to employee" with the ADP logo.
- Section: "Standard health cover for all employees" with subtext "Standard cover available to all employees".
- Section: "Non-paid value to the employee" containing a box for "Employee value defaults":
 - Amount (£): 600.00
 - Frequency: Annual (dropdown menu)
 - Cost to employer (£): 600.00
 - Frequency: Annual (dropdown menu)
 - Benefit in kind:
- Footer: "Help", "Back", "Next", "Cancel" buttons.

Figure 1 - 8 Benefits Setup Assistant – Coverage Non-paid value

Value to Employee field descriptions

Table 1 - 7 Field Descriptions – Employee payment

Field	Description
Non-paid value to employee - Employee value defaults	
Amount	This is the default amount for this coverage level that will automatically be applied if not overridden at employee level from the People > Employment > Benefits page. The amount is used in conjunction with the Frequency field.
Frequency	This field defines the default frequency for how often the Amount , defined in the above field, is paid. Both the amount and frequency can be overridden at Employee level from the People > Employment > Benefits page.
Cost to employer	This is the default amount that the benefit costs the employer, this field is used in conjunction with the associated Frequency field to determine the cost to the employer over a specific period of time. The actual cost may be overridden at employee level from the People > Employment > Benefits page.
Frequency	This field defines the default frequency for how often the Cost , defined in the above field, is incurred. Both the cost and frequency can be overridden at Employee level from the People > Employment > Benefits page.
Benefit in kind	<p>If the benefit coverage is of the kind that will not appear on the employee’s payslip, but does have a monetary value, such as a company health insurance that the employee is not required to pay into, then this benefit coverage will have tax implications and should be identified here by selecting this check-box.</p> <p>When the Employee Benefit Report or Benefit Statement is viewed, these types of benefit will be identified by an accompanying asterisk.</p> <p>Note: This sort of benefit would usually be detailed on the employee’s Form P11d.</p>

Once this coverage level page has been completed, then clicking Next will return the assistant to the **Coverage list** page.

Each coverage level should be set up as required, once all coverage levels have been configured, then select the **I’ve finished** option, from the coverage list options.

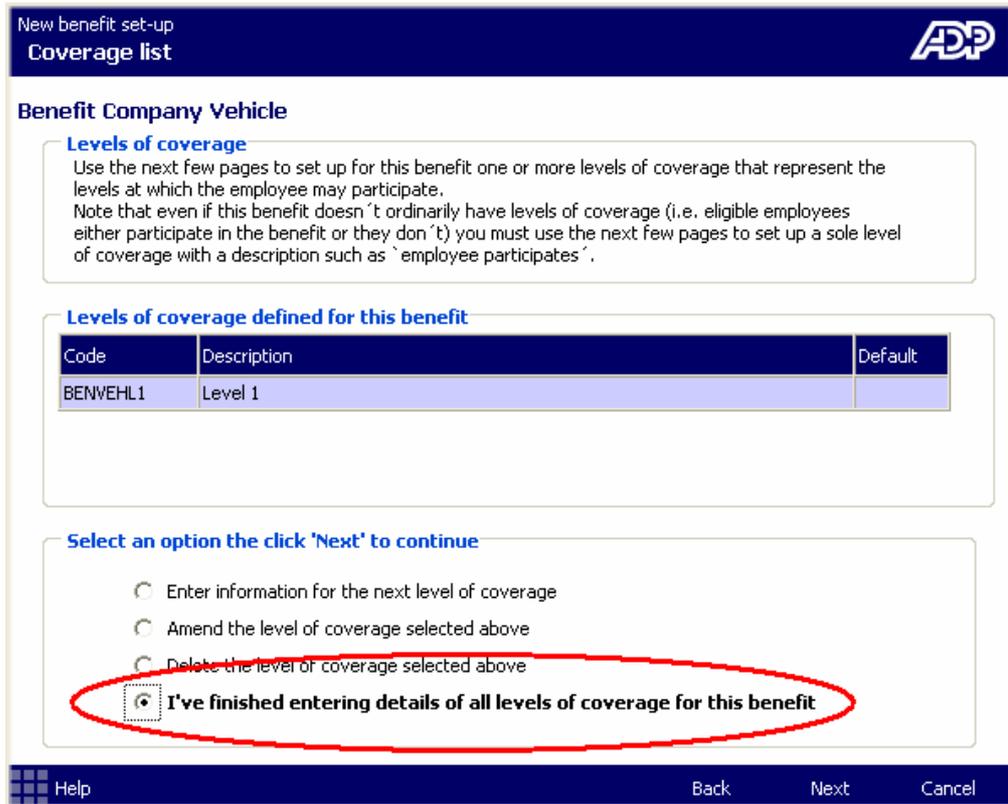


Figure 1 - 9 Benefits Setup Assistant – Coverage list options

Once all coverage levels have been created, then the process can be moved on to the next stage by **selecting I've finished entering details of all levels of coverage for this benefit** option, and then clicking on the **Next** button at the foot of the page.

Creating an opt-out option

There will be occasions when an employer is providing employee benefits that certain employees choose not to take. For these cases, ADP freedom provides the Opt-out page.

Figure 1 - 10 Benefits Setup Assistant – Opt-out

If there are likely to be employees who would want to opt out of this benefit, then the **Do you wish to record employee non-participation in this benefit?** check-box should be selected.

Opt-out field descriptions

Table 1 - 8 Field Descriptions – Opt-out

Field	Description
Non participation level coverage	
Coverage code	A unique user defined code that is used to identify this benefit coverage within ADP freedom. The code can be up to ten alpha numeric characters.
Default	Where a benefit has been defined as Core , then one coverage level must be identified as the Default level. Core benefits are those that are open to all employees and can be processed as automatic enrolments. If a benefit is Core , then the system automatically assigns the benefit using the Default level of coverage to every eligible employee. <i>Note: Only core benefits can have a default level, and there can only be one default level for a core benefit.</i>
Opt-out	ADP freedom provides a selection of different opt out reasons. If the employee has decided not to take this

	benefit, then select the most appropriate reason from the options provided here.
Employee declines	ADP freedom provides a selection of different opt out reasons. If the employee has decided not to take this benefit, then select the most appropriate reason from the options provided here.
Non-participant	ADP freedom provides a selection of different opt out reasons. If the employee has decided not to take this benefit, then select the most appropriate reason from the options provided here.
Other	If there is a specific other reason why the employee does not wish to take this benefit, then select this box and enter the reason why into the associated text box. The text box allows the user to enter up to 100 characters.
Benefit statement text	Disabled unless Other is selected. If there is a specific other reason why the employee does not wish to take this benefit, then selecting the Other box will enable this field. The text box allows the user to enter up to 100 characters to describe the reason why the employee does not wish to take this benefit.
Does non-participation in this benefit have an employee payment associated with it?	If opting out of this benefit coverage involves payment to the employee then this check-box should be selected.
Cash in lieu payment to the employee	Select this box to indicate that the employee benefit opt-out is compensated by a cash payment. Note: <i>This box is only enabled when the user has confirmed that there are costs associated to this level of coverage by having selected Does non-participation in this benefit have an employee payment associated with it?</i>
Link to payroll employee earnings	If the employee payments are to be paid automatically by being linked to a payroll earning then this check-box should be selected. Note 1: <i>This box is only enabled when the user has confirmed that there are costs associated to this level of coverage by having selected the Cash in lieu payment to the employee check-box</i> Note 2: <i>The relevant benefit earning should have already</i>

	<i>been set up on the Company > Company Setup > Earnings > Employee Definition page.</i>
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If there are payments associated with an employee opt-out then, on clicking **Next**, the assistant will open the **cash in lieu** page.

Setting up employee opt-out payment

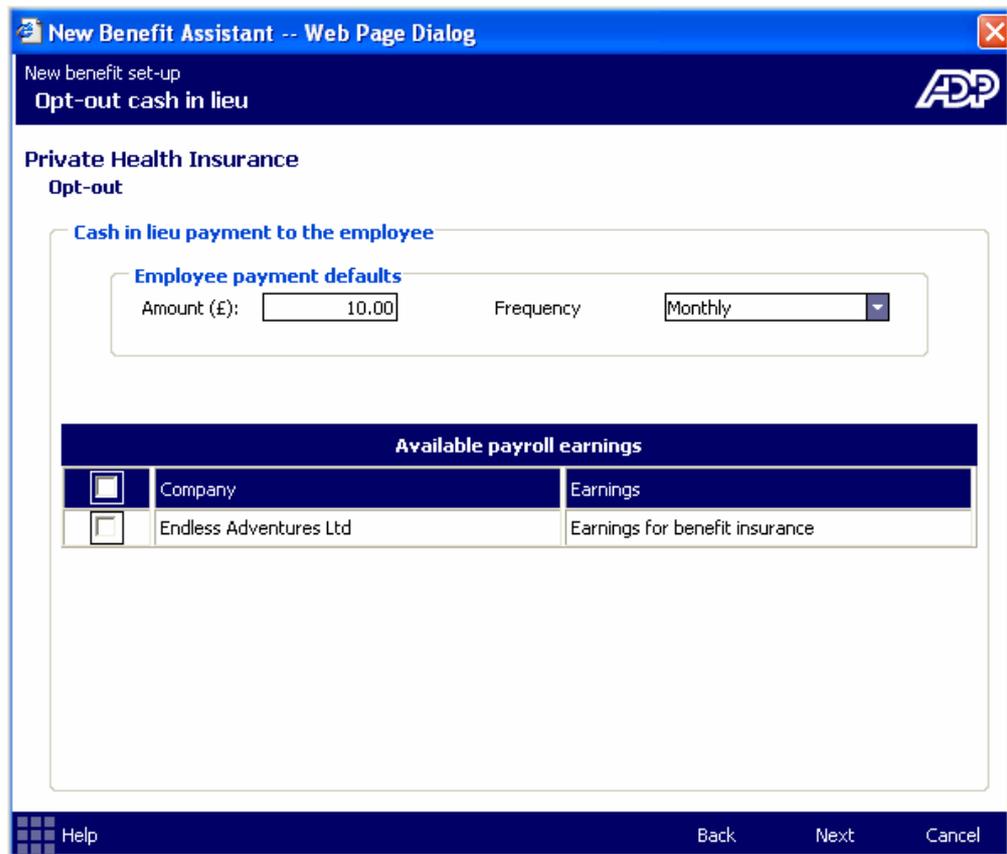


Figure 1 - 11 BenefitsSetup Assistant – Employee payment

Note: *Only earnings that have previously been configured as available for benefits (usually with a classification of **Benefit**, but could be other classifications if requested) on the **Company > Company setup > Earnings > Earnings Definition** page, will be displayed here. If the earning that you wish to associate with this benefit does not appear, contact your ADP representative.*

Employee opt-out payment field descriptions

Table 1 - 9 Field Descriptions – Employee opt-out payment

Field	Description
Employer payment defaults	
Amount	This is the default payment amount for this opt-out that will automatically be applied if not overridden at employee level from the People > Employment > Benefits page. The

	amount is used in conjunction with the Frequency field.
Frequency	This field defines how often the earning is paid, used in conjunction with the Amount field. Both the amount and frequency can be overridden at Employee level.
Available payroll deductions	
Company	This is the company for which the benefit earning is being configured. Note: <i>In most cases there may be only one company to choose from.</i>
Earnings	This is the earning that has been configured for use with benefits. Note: <i>If the earning that you wish to use does not appear in the grid then it may not have been configured for use with benefits. Contact your ADP representative.</i>

On completion of the opt-out page, clicking next will progress the assistant to the last page where the user can opt to save the benefit and close the assistant, or to save the benefit and restart the assistant to create a new benefit.

Setting up a benefit for share options

Share options provide the employee with the right, but not the obligation, to purchase shares at some point in the future at a predetermined price. There may be a restriction on the period in which the option can be exercised.

The shares are purchased by exercising the option and paying a set price, which will usually be the market value of the shares at the time of the grant. If the share price rises then the option is typically exercised, conversely, if the share price drops below the exercise price, usually the option holder will choose not to exercise the option.

Setting up benefits for share options is pretty much the same as for generic benefits other than one extra page that is provided to collect details of the grant date and option price.

To create a share option employee benefit, select **Company > Benefits > New**.

Chapter 1 Creating Employee Benefits

New benefit set-up
Benefit type selection

Select the type of benefit and click 'Next' to continue

Benefit Type
Private Health Insurance (e.g. Medical, Dental, Optical)
Pension (main contribution)
Pension (additional contribution)
Leave Plan
Insurance (e.g. Life, PHI, Critical Illness, Travel)
SAYE (including Share Save)
Share Option
Company vehicle
Company Property (e.g. Personal Computer)
Loan (e.g. low or zero interest, season ticket)

A type of benefit other than those listed above:

Help Next Cancel

Figure 1 - 12 Benefits Setup Assistant – Share Option

From the **Benefit Type** grid, select **Share Option**, then click **Next**.

New benefit set-up
Benefit details

Share Option

Benefit details

Benefit code: SHROPT

Benefit description: Share Options 2006

Start date: 01/01/2006 End date: dd/mm/yyyy

Qualification period: After 1 month

Provider: Norwich Union

Benefit indicators

Core benefit: Include in Benefit Statement:

Benefit reporting

Short name: Share Options 2006

Category:

Display sequence (within category sequence):

Help Back Next Cancel

Figure 1 - 13 Benefits Setup Assistant – Share Option details page

Chapter 1 Creating Employee Benefits

Complete all the mandatory blue fields and any other fields as required. If necessary, refer to Table 1 - 1, Field descriptions for the benefit details page.

Once the page has been completed, click **Next** to progress the assistant to the next stage of the process.

Figure 1 - 14 Benefits Setup Assistant – Share Option details page 2

Share Options details page 2 - field descriptions

Table 1 - 10 Field Descriptions – Share Option details page 2

Field	Description
Share option details	
Grant date	This is the earliest date that the share option can be exercised. The employee has the option to purchase the shares at the set Grant price or to allow the option to lapse.
Expiration date	If the employee has not exercised their right to purchase the shares by this date, then the option to purchase at the set Grant price lapses.
Grant type	This is a user defined type that can be used to identify the particular share option scheme. The field will accept up to 40 characters.

Chapter 1 Creating Employee Benefits

Grant price	This is the price that was a set for the purchase of shares, this will usually be the market value of the shares at the time of the grant.
--------------------	--

On completion of the page details, clicking **Next** will progress the assistant to the coverage stage of the process.

New Benefit Assistant -- Web Page Dialog

New benefit set-up
Coverage list

Share Options 2006

Levels of coverage
Use the next few pages to set up for this benefit one or more levels of coverage that represent the levels at which the employee may participate.
Note that even if this benefit doesn't ordinarily have levels of coverage (i.e. eligible employees either participate in the benefit or they don't) you must use the next few pages to set up a sole level of coverage with a description such as 'employee participates'.

Levels of coverage defined for this benefit

Code	Description	Default
No levels of coverage have yet been defined		

Select an option the click 'Next' to continue

- Enter information for the next level of coverage**
- Amend the level of coverage selected above
- Delete the level of coverage selected above
- I've finished entering details of all levels of coverage for this benefit

Help Back Next Cancel

Figure 1 - 15 Benefits Setup Assistant – Share option coverage

There are at least two levels of coverage for each benefit, one level being an opt-out where eligible employees have chosen not to participate in the benefit.

Select **Enter information for the next level of coverage** and click next.

Figure 1 - 16 Benefits Setup Assistant – Share option coverage definition

Complete all fields as required. If necessary, refer to **Coverage details field descriptions** for assistance.

Once the required fields have been completed, clicking on the **Next** button will either return the assistant to **the Coverage List** where the user has the option of setting up further levels of coverage for this benefit, or, where the user has identified that there are costs associated with this benefit, the assistant will open the pages required to configure the relevant costs, refer to the section **Setting up employee contributions** onwards for details on how to complete the contributions pages.

Alternatively, the user can select **I've finished entering details of all levels of coverage for this benefit** where clicking **Next** will provide the user with configuring the opt-out options. Refer to the section, **Creating an opt-out option**

and the associated pages for details on how to configure the opt out options.

On completion of the Opt-out coverage the assistant has acquired the relevant information and clicking **Next** provides the user with the options either to save the benefit, **Review** the details that have been entered, or to go back and change some of the details that have been entered.



Figure 1 - 17 Benefits Setup Assistant – Saving or reviewing the benefit details

Reviewing the benefit details

If the user elects to review the benefit details, on clicking **Review**, the assistant opens up a benefit viewer page.

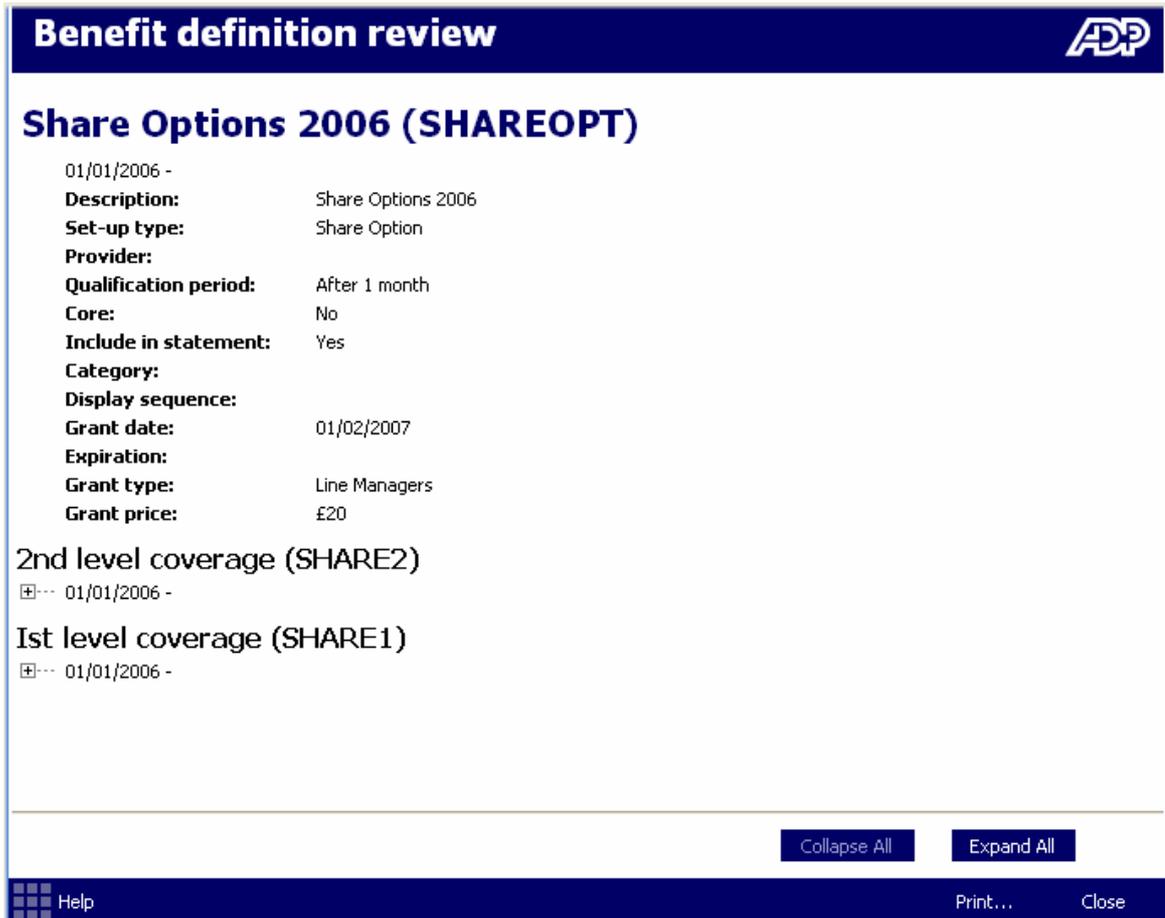


Figure 1 - 18 Benefits Setup Assistant – reviewing the benefit details

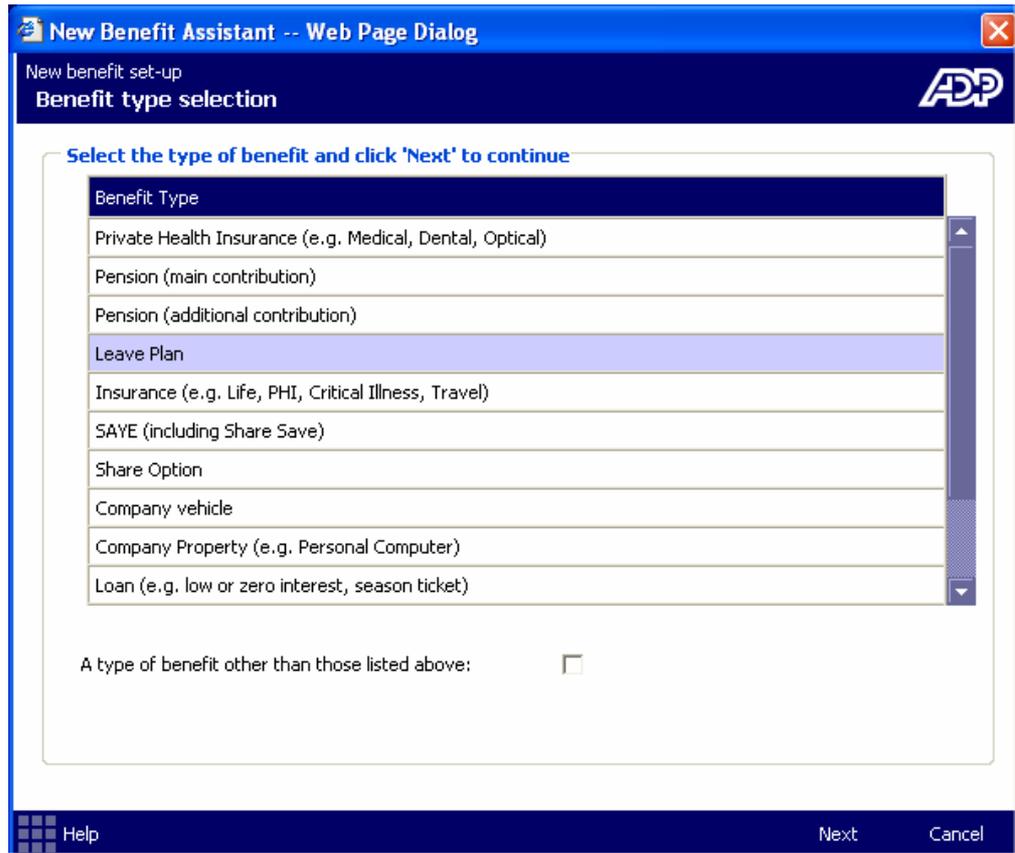
This viewer allows the user to check the full details of the benefit but nothing can be changed from this page. The **Expand All** and **Collapse All** buttons provide the user with control over how much detail appears on the page. Selecting the **Print** option allows the user to print the details to a local printer. The details will always be printed in the **Expand All** mode.

Setting up leave plan benefit records

Although leave plans themselves are not configured or maintained through the benefits assistant, employers will probably wish to maintain a full list of benefits that their employees are signed up to, this will include leave plans.

To configure leave plans as part of the benefit options, select **Company > Benefits > New**.

Chapter 1 Creating Employee Benefits



The screenshot shows a web-based dialog box titled "New Benefit Assistant -- Web Page Dialog". The main heading is "Benefit type selection" with the ADP logo in the top right corner. Below the heading, there is a instruction: "Select the type of benefit and click 'Next' to continue". A list of benefit types is displayed in a scrollable area, with "Leave Plan" highlighted in blue. The list includes: Private Health Insurance (e.g. Medical, Dental, Optical), Pension (main contribution), Pension (additional contribution), Leave Plan, Insurance (e.g. Life, PHI, Critical Illness, Travel), SAYE (including Share Save), Share Option, Company vehicle, Company Property (e.g. Personal Computer), and Loan (e.g. low or zero interest, season ticket). Below the list, there is a checkbox labeled "A type of benefit other than those listed above:". At the bottom of the dialog, there are three buttons: "Help", "Next", and "Cancel".

Benefit Type
Private Health Insurance (e.g. Medical, Dental, Optical)
Pension (main contribution)
Pension (additional contribution)
Leave Plan
Insurance (e.g. Life, PHI, Critical Illness, Travel)
SAYE (including Share Save)
Share Option
Company vehicle
Company Property (e.g. Personal Computer)
Loan (e.g. low or zero interest, season ticket)

A type of benefit other than those listed above:

Help Next Cancel

Figure 1 - 19 Benefits Setup Assistant – Leave Plan

From the Benefit type selection page, select **Leave Plan** and click **Next**.

Chapter 1 Creating Employee Benefits

The screenshot displays a web-based form titled "New Benefit Assistant -- Web Page Dialog" with the ADP logo in the top right corner. The main heading is "New benefit set-up" followed by "Benefit details". The form is organized into three sections:

- Leave Plan**
 - Benefit details**
 - Benefit code: LEAVE
 - Benefit description: Leave plan benefits
 - Start date: 01/01/2006 (calendar icon)
 - End date: dd/mm/yyyy (calendar icon)
 - Qualification period: (disabled dropdown menu)
 - Provider: (dropdown menu)
 - Benefit indicators**
 - Core benefit:
 - Include in Benefit Statement:
 - Benefit reporting**
 - Short name: Leave plan benefits
 - Category: (dropdown menu)
 - Display sequence (within category sequence): (text input field)

At the bottom of the dialog, there are four buttons: Help, Back, Next, and Cancel.

Figure 1 - 20 Benefits Setup Assistant – Leave Plan details

For details on how to complete the fields, refer to the [Benefit Details field description](#) table. The only exception to the descriptions that are provided is that for Leave benefits, the **Qualification period** field is not applicable and is therefore disabled.

Once the relevant fields have been completed, clicking the **Next** button progresses the assistant through to the Leave Plan selection stage.

Chapter 1 Creating Employee Benefits

New Benefit Assistant -- Web Page Dialog

New benefit set-up

Benefit details (Leave Plan)

ADP

Leave Plan Benefits

Setting up a Leave Plan benefit creates a linkage to Leave Plan records of the type that you select. Note that all maintenance of Leave Plan information is done using the Leave Plan feature. You can't maintain Leave Plan information from the Benefit feature.

Select a type of Leave Plan

- Annual Leave
- Sick pay
- Maternity
- Paternity
- Adoption
- Paternity (Adoptive)

Help Back Next Cancel

Figure 1 - 21 Benefits Setup Assistant – Leave Plan selection

Select the type of leave plan to which this benefit relates and click **Next** to progress the assistant to the coverage list page. On initial display there will be no levels of coverage defined.

Chapter 1 Creating Employee Benefits

New Benefit Assistant -- Web Page Dialog

New benefit set-up
Coverage list

Generic Benefit for Annual Leave 2

Levels of coverage
Use the next few pages to set up for this benefit one or more levels of coverage that represent the levels at which the employee may participate.
Note that even if this benefit doesn't ordinarily have levels of coverage (i.e. eligible employees either participate in the benefit or they don't) you must use the next few pages to set up a sole level of coverage with a description such as 'employee participates'.

Levels of coverage defined for this benefit

Code	Description	Default
No levels of coverage have yet been defined		

Select an option the click 'Next' to continue

- Enter information for the next level of coverage**
- Amend the level of coverage selected above
- Delete the level of coverage selected above
- I've finished entering details of all levels of coverage for this benefit

Help Back Next Cancel

Figure 1 - 22 Benefits Setup Assistant – Leave Plan coverage list

As there are no levels of coverage currently available, the only option is to select **Enter information for the next level of coverage** and click **Next**.

The screenshot shows a web page dialog titled "New Benefit Assistant -- Web Page Dialog" with a close button in the top right corner. Below the title bar, there is a dark blue header with the text "New benefit set-up" and "Coverage details" on the left, and the ADP logo on the right. The main content area is titled "Leave Plan Benefits" and "New level of coverage". Underneath, there is a section "Coverage level set-up" containing four input fields: "Coverage code:" with the value "LEAVE2", "Coverage description:" with the value "Level 2 for Annual Leave", "Default:" with an unchecked checkbox, and "Benefit Statement text:" with an empty text area. Below this section, there is a question "Does this coverage level have contributions or payments associated with it?" followed by an unchecked checkbox. Underneath this question, there are six checkboxes arranged in two columns, all of which are disabled (greyed out): "Employee contribution:", "Employer contribution:", "Employee payment:", "Non-paid value to the employee:", "Link to payroll employee deduction:", "Link to payroll employer contribution:", and "Link to payroll employee earnings:". At the bottom of the dialog, there is a dark blue footer with a "Help" button on the left and "Back", "Next", and "Cancel" buttons on the right.

Figure 1 - 23 Benefits Setup Assistant – Leave Plan coverage

Leave plans have no contributions or payments associated with them so these field options are disabled. Assistance in completing the other fields can be gained from viewing the **Coverage details field descriptions**.

There are only two coverage types available for Leave Plan benefits, either an employee wants to take the benefit or, they want to opt-out.

Clicking **Next** progresses the assistant to the next stage of the process.

Chapter 1 Creating Employee Benefits

New Benefit Assistant -- Web Page Dialog

New benefit set-up
Coverage list

Generic Benefit for Annual Leave 2

Levels of coverage
Use the next few pages to set up for this benefit one or more levels of coverage that represent the levels at which the employee may participate.
Note that even if this benefit doesn't ordinarily have levels of coverage (i.e. eligible employees either participate in the benefit or they don't) you must use the next few pages to set up a sole level of coverage with a description such as 'employee participates'.

Levels of coverage defined for this benefit

Code	Description	Default
ANNLEAVE1	Standard annual leave plan	

Select an option the click 'Next' to continue

- Enter information for the next level of coverage
- Amend the level of coverage selected above
- Delete the level of coverage selected above
- I've finished entering details of all levels of coverage for this benefit**

Help Back Next Cancel

Figure 1 - 24 Benefits Setup Assistant – Leave Plan coverage completed

As there are only two levels of coverage, the employee either participates in the benefit or opts out of the benefit, the user should accept the default selection of **I've finished entering details of all levels of coverage for this benefit** and click **Next**.

Chapter 1 Creating Employee Benefits

The screenshot shows a web browser window titled "New Benefit Assistant -- Web Page Dialog". The page content is as follows:

- Header: "New benefit set-up" and "Opt-out" with the ADP logo.
- Section: "Generic Benefit for Annual Leave 2".
- Question: "Do you wish to record employee non-participation in this benefit?" with a checkbox that is currently unchecked.
- Section: "Non-participation level of coverage" containing:
 - Coverage code: [text input field]
 - Default:
 - Coverage description: Radio buttons for "Opt-out" (selected), "Employee declines", "Non-participant", and "Other".
 - Other: [text input field]
- Section: "How do you wish to describe non-participation in this benefit on the Benefits Statement?" containing:
 - Benefit Statement text: [text input field]
- Question: "Does non-participation in this benefit have an employee payment associated with it?" with a checkbox that is currently unchecked.
- Section: "Cash in lieu payment to the employee:" with a checkbox that is currently unchecked.
- Section: "Link to payroll employee earnings:" with a checkbox that is currently unchecked.
- Footer: "Help", "Back", "Next", and "Cancel" buttons.

Figure 1 - 25 Benefits Setup Assistant – Leave Plan opt-out coverage

It is unlikely that employees would wish to opt out of the annual leave benefit, but, to cover all possibilities, ADP freedom provides the means to record an opt-out anyway.

If there is a requirement to configure an opt-out, refer to the [field descriptions table](#) for the opt-out page.

If there is no requirement to configure an opt-out, then leave the **Do you wish to record employee non-participation in this benefit?** check-box blank and click **Next** to proceed to the next stage of the process.

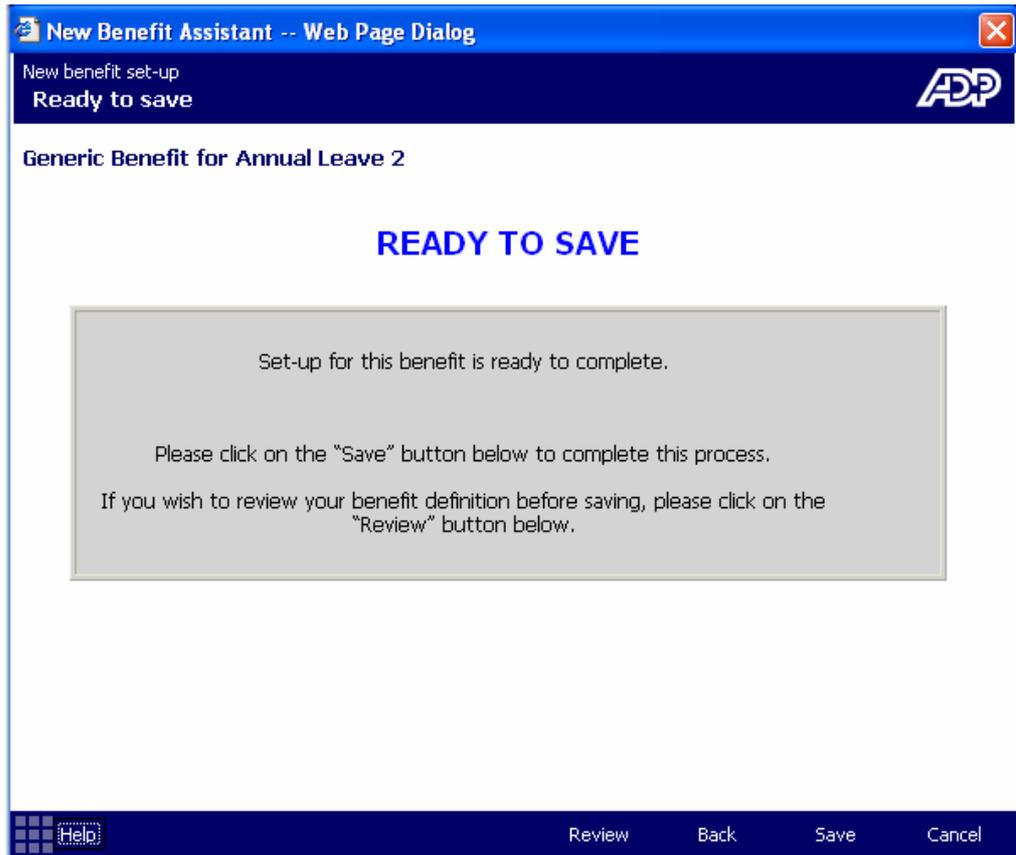


Figure 1 - 26 Benefits Setup Assistant – Saving or reviewing the leave benefit details

Reviewing the benefit details

If the user elects to review the benefit details, on clicking **Review**, the assistant opens up a benefit viewer page.

Benefit definition review **ADP**

Generic Benefit for Annual Leave 2 (BENLEAVE2)

01/02/2006 -

Description:	Generic Benefit for Annual Leave 2
Set-up type:	Leave Plan
Provider:	
Qualification period:	
Core:	No
Include in statement:	No
Category:	
Display sequence:	
Leave plan type:	Annual Leave

Standard annual leave plan (ANNLEAVE1)

01/02/2006 -

[Collapse All](#) [Expand All](#)

[Help](#) [Back](#) [Print...](#)

Figure 1 - 27 Benefits Setup Assistant – reviewing the leave benefit details

This viewer allows the user to check the full details of the benefit but nothing can be changed from this page. The **Expand All** and **Collapse All** buttons provide the user with control over how much detail appears on the page. Selecting the **Print** option allows the user to print the details to a local printer. The details will always be printed in the **Expand All** mode.

Note: The details of this benefit have not been saved yet, to save the benefit, or to change any of the current details, click **Back**.

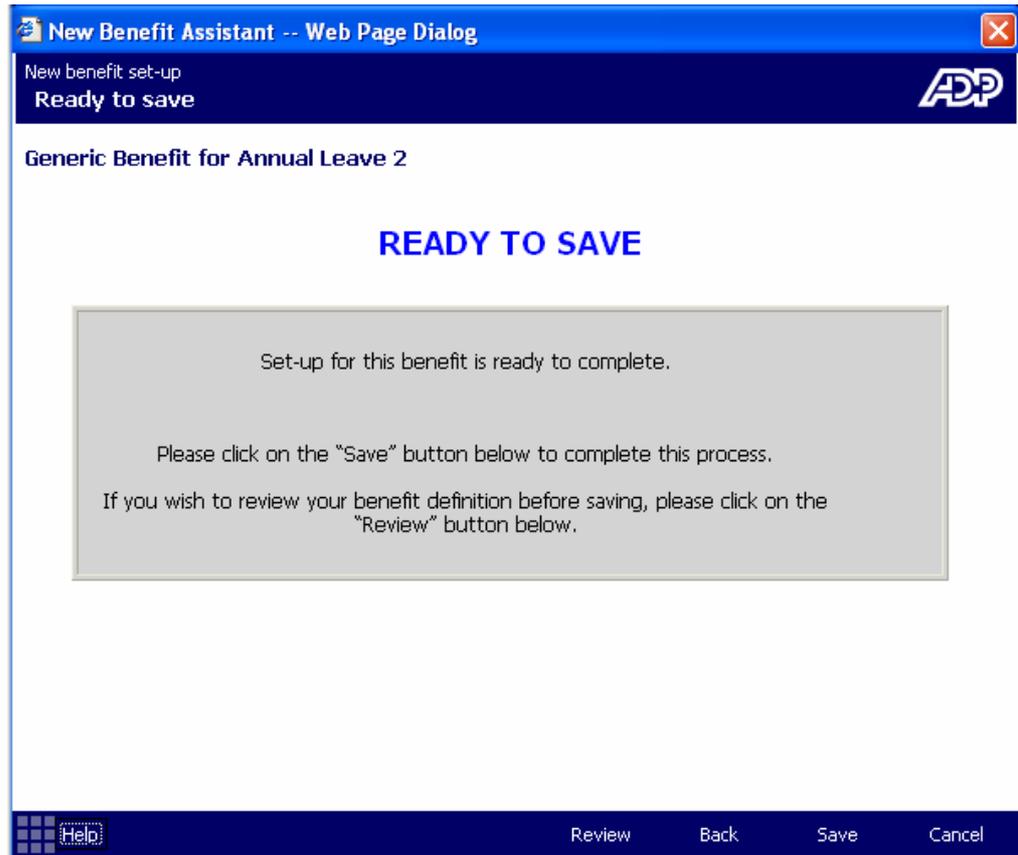


Figure 1 - 28 Benefits Setup Assistant – Saving or reviewing the leave benefit details

Saving the benefit details

Once the benefit details have been reviewed and the user is satisfied that the details are correct, then clicking **Save** will transfer the details to the ADP freedom database.

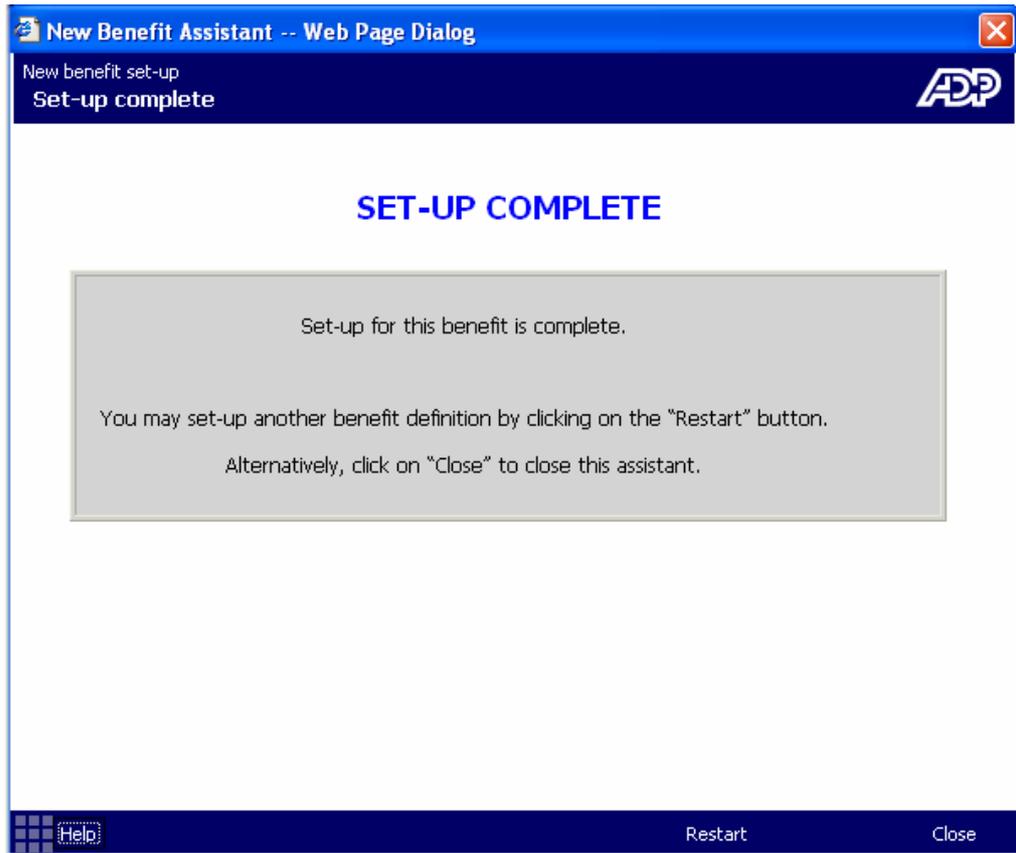


Figure 1 - 29 Benefits Setup Assistant – Set-up complete

Leave plan benefits should be configure for each of the different leave plan types of:

- Annual leave
- Sick pay
- Maternity
- Paternity
- Adoption
- Paternity (Adoptive)

Creating pension benefit records

Although pension plans themselves are not configured or maintained through the benefits assistant, employers will probably wish to maintain a full list of benefits that their employees are signed up to, this will include pension plans.

To configure pension plans as part of the benefit options, select **Company > Benefits > New**.

Chapter 1 Creating Employee Benefits

New Benefit Assistant -- Web Page Dialog

New benefit set-up
Benefit type selection

Select the type of benefit and click 'Next' to continue

Benefit Type
Private Health Insurance (e.g. Medical, Dental, Optical)
Pension (main contribution)
Pension (additional contribution)
Leave Plan
Insurance (e.g. Life, PHI, Critical Illness, Travel)
SAYE (including Share Save)
Share Option
Company vehicle
Company Property (e.g. Personal Computer)
Loan (e.g. low or zero interest, season ticket)

A type of benefit other than those listed above:

Help Next Cancel

Figure 1 - 30 Benefits Setup Assistant – Pension benefit

From the **Benefit type selection** page, select the relevant **Pension** option and click **Next**, the assistant will now open the **Benefit details** page.

Chapter 1 Creating Employee Benefits

The screenshot displays a web-based form titled "New Benefit Assistant -- Web Page Dialog" with a sub-header "New benefit set-up Benefit details" and the ADP logo. The main section is "Pension (main)" and is divided into three sub-sections:

- Benefit details:** Includes fields for "Benefit code:" (BENPEN1), "Benefit description:" (Pension Main Contribution), "Start date:" (01/01/2006), "End date:" (dd/mm/yyyy), "Qualification period:" (dropdown), and "Provider:" (dropdown).
- Benefit indicators:** Includes a checked checkbox for "Core benefit:" and a checked checkbox for "Include in Benefit Statement:".
- Benefit reporting:** Includes fields for "Short name:" (Pension Main Contribution), "Category:" (dropdown), and "Display sequence (within category sequence):" (text input).

At the bottom, there are navigation buttons: "Help", "Back", "Next", and "Cancel".

Figure 1 - 31 Benefits Setup Assistant – Pension scheme details

For details on how to complete the **Benefit details** fields, refer to the [Benefit details field description](#) table. Once the relevant fields have been completed, clicking the **Next** button progresses the assistant through to the Pension scheme selection stage.

Chapter 1 Creating Employee Benefits

New Benefit Assistant -- Web Page Dialog

New benefit set-up

Benefit details (Pension)

Pension Main Contribution

Setting up a Pension benefit involves creating a linkage to Pension Scheme records. Note that all maintenance of Pension Scheme data (including the employee and employer contribution records that are linked to payroll) is done using the Pension feature. You can't maintain Pension Scheme records from the Benefit feature.

Link pension schemes

<input type="checkbox"/>	Company	Pension scheme
<input checked="" type="checkbox"/>	Bond Enterprise	Bond Pension
<input type="checkbox"/>	Endless Adventures Ltd	Ages Scheme
<input type="checkbox"/>	Endless Adventures Ltd	Avc Scheme
<input type="checkbox"/>	Endless Adventures Ltd	Earnings Band Scheme
<input type="checkbox"/>	Endless Adventures Ltd	Endless Adventures Pension Fund

Help Back Next Cancel

Figure 1 - 32 Benefits Setup Assistant – Pension scheme selection

This page lists all pension schemes that are associated with your organisation. Select the pension scheme to which this benefit relates and click **Next** to progress the assistant to the coverage list page. On initial display there will be no levels of coverage defined.

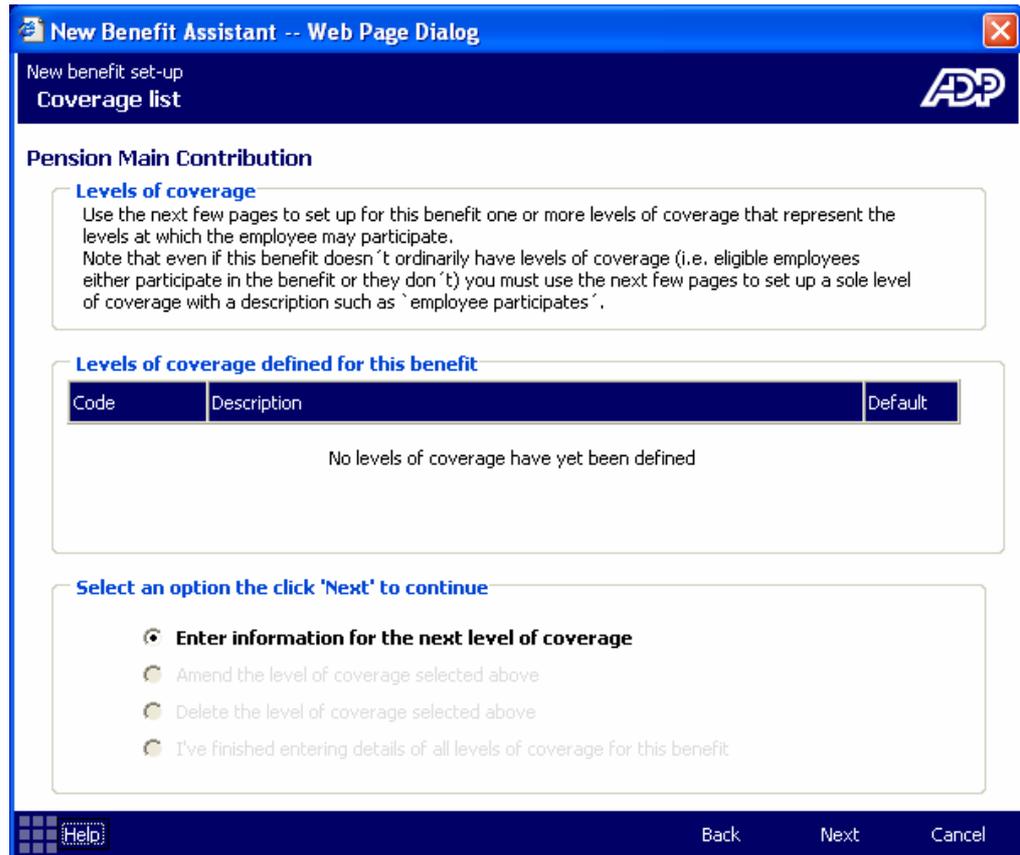


Figure 1 - 33 Benefits Setup Assistant – Pension scheme coverage list

As there are no levels of coverage currently available, the only option is to select **Enter information for the next level of coverage** and click **Next**.

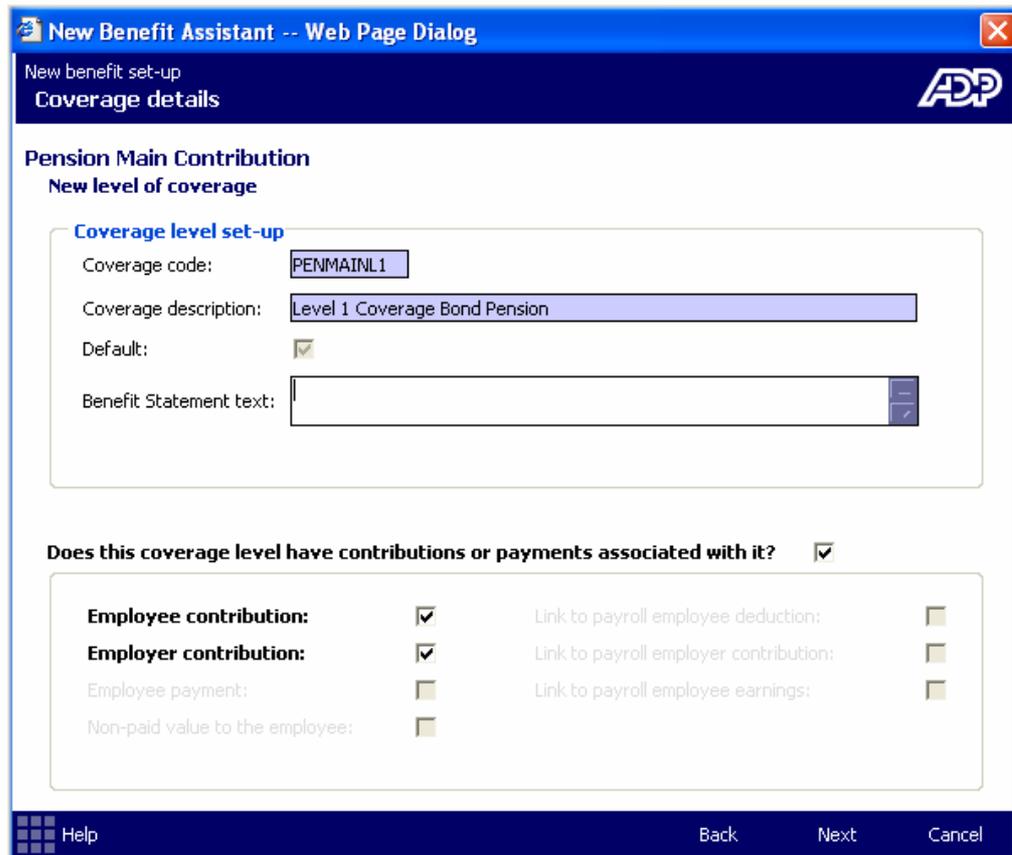


Figure 1 - 34 Benefits Setup Assistant – pension scheme coverage

As stated previously, pension schemes are maintained directly from the pension scheme pages (**Company > Company Setup > Company > Pension Schemes**) and cannot be maintained from the benefit pages. The pension benefit pages provide the means to record and report on the full range of employee pension benefits, as such, employee and employer contributions that are recorded here cannot be linked directly to employee payroll deductions or employer payroll contributions, hence the linkage fields are disabled, and merely reflect those that have been configured on the pension scheme pages.

The default selections for this page are that the **Employee** and **Employer** contribution boxes have been selected but either one of these can be deselected if required. Assistance in completing the other fields on this page can be gained from viewing the **Coverage details field descriptions**.

Once the required fields have been completed, clicking on the **Next** button will either return the assistant to **the Coverage List** where the user has the option of setting up further levels of coverage for this benefit, or, where the user has identified that there are costs associated with this benefit, the assistant will open the pages required to configure the relevant costs, refer to the section **Setting up employee contributions** onwards for details on how to complete the contributions pages.

Alternatively, the user can select **I've finished entering details of all levels of coverage for this benefit** where clicking **Next** will provide the user with configuring the opt-out options.

Chapter 1 Creating Employee Benefits

If there is a requirement to configure an opt-out, refer to the [field descriptions table](#) for the opt-out page.

If there is no requirement to configure an opt-out, then leave the **Do you wish to record employee non-participation in this benefit?** check-box blank and click **Next** to proceed to the next stage of the process.

On completion of the Opt-out coverage the assistant has acquired all necessary information and clicking **Next** provides the user with the options either to **Save** the benefit, **Review** the details that have been entered, or to go **Back** and change some of the details that have been entered.

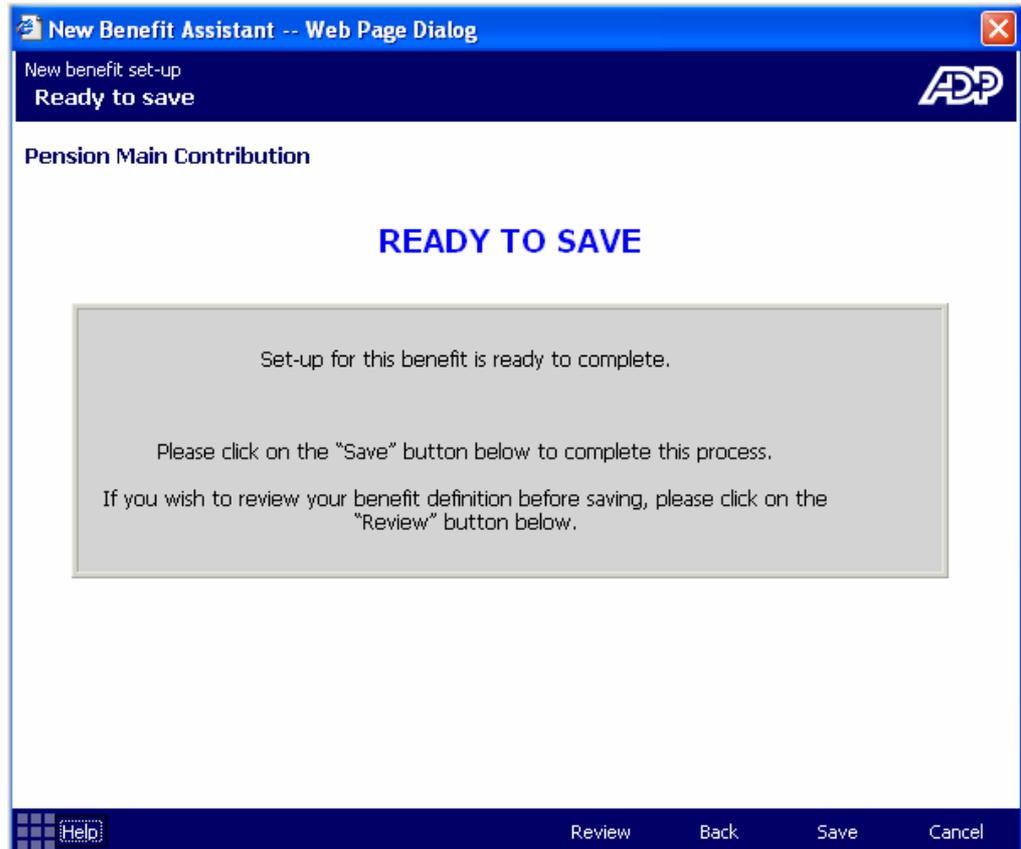


Figure 1 - 35 Benefits Setup Assistant – Saving or reviewing the benefit details

Reviewing the benefit details

If the user elects to review the benefit details, on clicking **Review**, the assistant opens up a benefit viewer page.

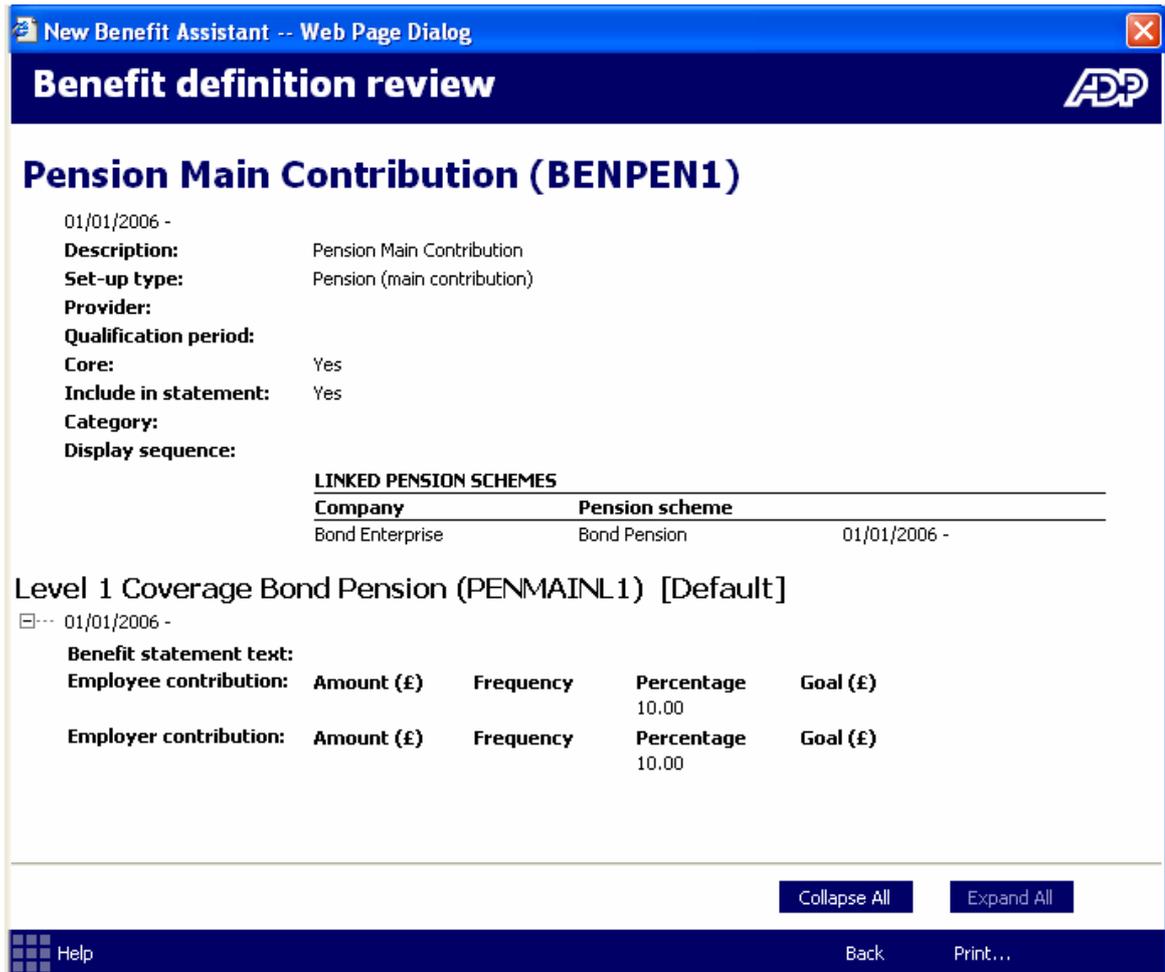


Figure 1 - 36 Benefits Setup Assistant – reviewing the pension benefit details

This viewer allows the user to check the full details of the benefit but nothing can be changed from this page. The **Expand All** and **Collapse All** buttons provide the user with control over how much detail appears on the page. Selecting the **Print** option allows the user to print the details to a local printer. The details will always be printed in the **Expand All** mode.

Note: The details of this benefit have not been saved yet, to save the benefit, or to change any of the current details, click **Back**.

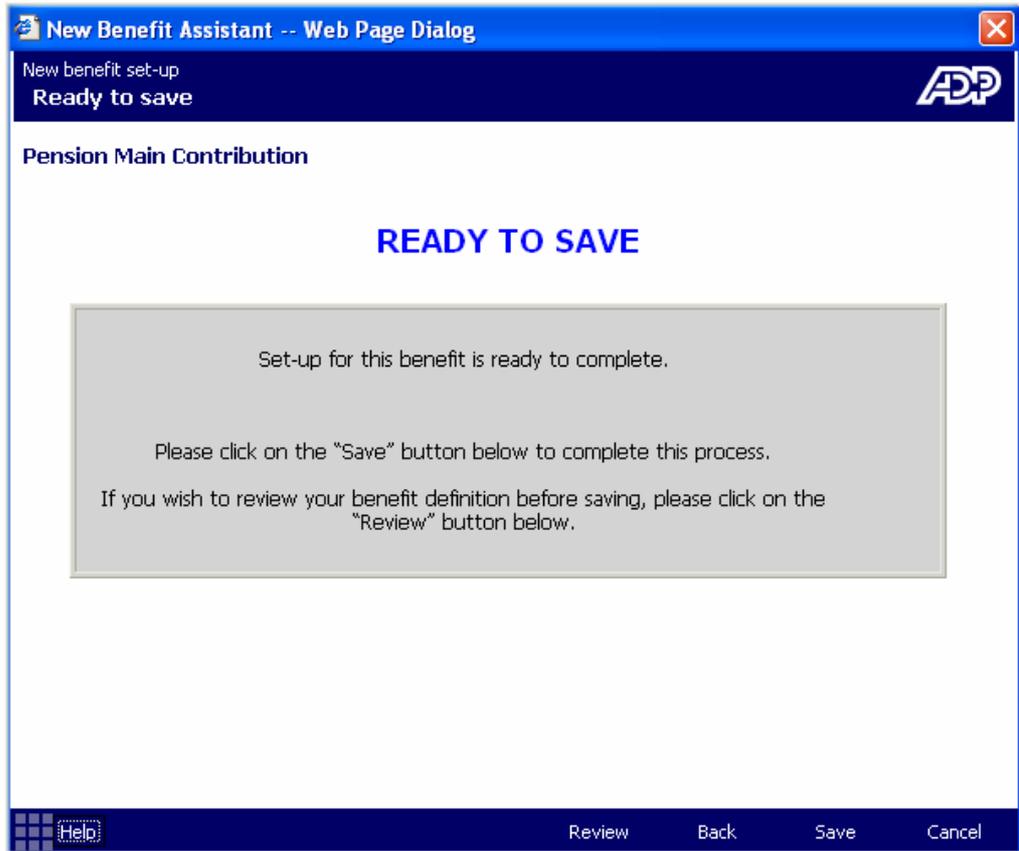


Figure 1 - 37 Benefits Setup Assistant – Saving the pension benefit details

Saving the benefit details

Once the benefit details have been reviewed and the user is satisfied that the details are correct, then clicking **Save** will transfer the details to the ADP freedom database.

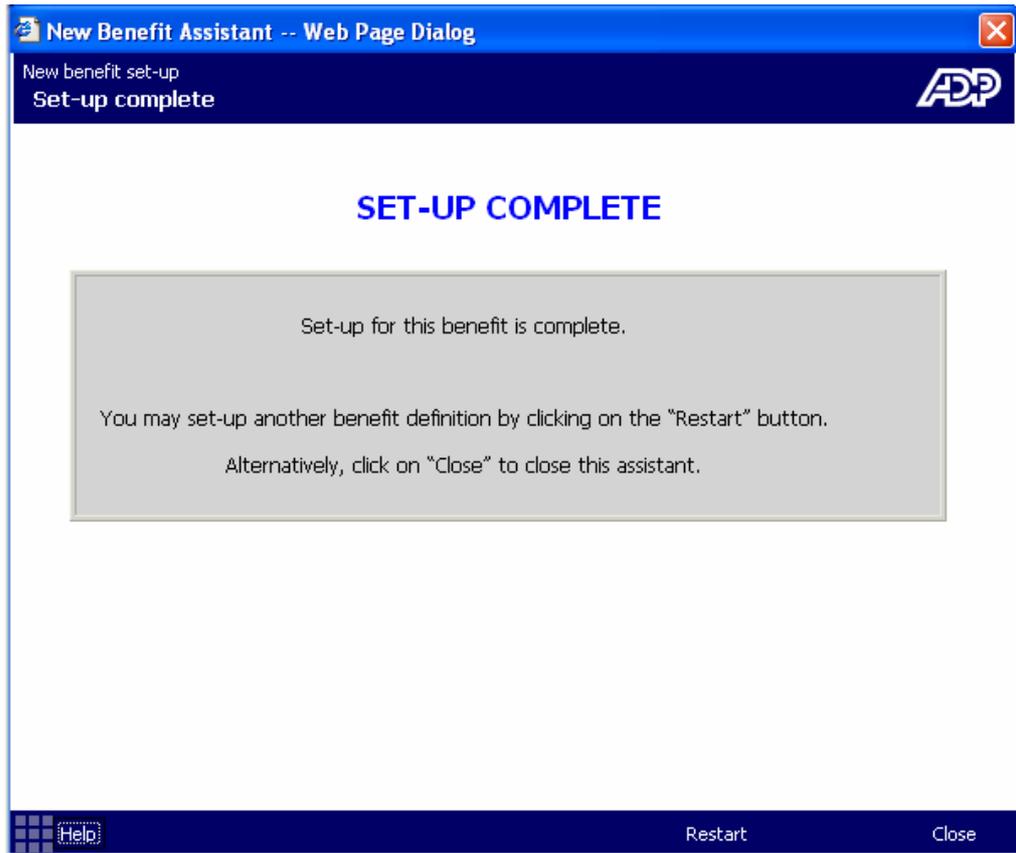


Figure 1 - 38 Benefits Setup Assistant – Set-up complete

Other benefit types

If there is a requirement to configure a benefit type other than is listed on the **Benefit type** page, then select the **A type of benefit other than those listed above** check-box.

To configure another type of benefit, other than the ones provided, select **Company > Benefits > New**.

Chapter 1 Creating Employee Benefits

New Benefit Assistant -- Web Page Dialog

New benefit set-up
Benefit type selection

Select the type of benefit and click 'Next' to continue

Benefit Type
Private Health Insurance (e.g. Medical, Dental, Optical)
Pension (main contribution)
Pension (additional contribution)
Leave Plan
Insurance (e.g. Life, PHI, Critical Illness, Travel)
SAYE (including Share Save)
Share Option
Company vehicle
Company Property (e.g. Personal Computer)
Loan (e.g. low or zero interest, season ticket)

A type of benefit other than those listed above:

Help Next Cancel

Figure 1 - 39 Benefits Setup Assistant – Other benefit type

From the **Benefit type selection** page, select the **A type of benefit other than those listed above** check-box and click **Next**, the assistant will now open the **Benefit details** page.

Chapter 1 Creating Employee Benefits

The screenshot shows a web-based form titled "New Benefit Assistant -- Web Page Dialog" with the ADP logo in the top right corner. The main heading is "Benefit details". Under the "Other" section, there are three sub-sections:

- Benefit details:** Includes fields for "Benefit code:" (COBEN1), "Benefit description:" (Child Care Vouchers), "Start date:" (01/01/2006), "End date:" (dd/mm/yyyy), "Qualification period:" (After 1 month), and "Provider:".
- Benefit indicators:** Includes a "Core benefit:" checkbox (unchecked) and an "Include in Benefit Statement:" checkbox (checked).
- Benefit reporting:** Includes "Short name:" (Child Care Vouchers), "Category:" (dropdown menu), and "Display sequence (within category sequence):" (text input field).

At the bottom of the dialog, there are buttons for "Help", "Back", "Next", and "Cancel".

Figure 1 - 40 Benefits Setup Assistant – Other benefit type details

For details on how to complete the **Benefit details** fields, refer to the [Benefit details field description](#) table. Once the relevant fields have been completed, click the **Next** to progress the assistant to the coverage list page. On initial display there will be no levels of coverage defined.

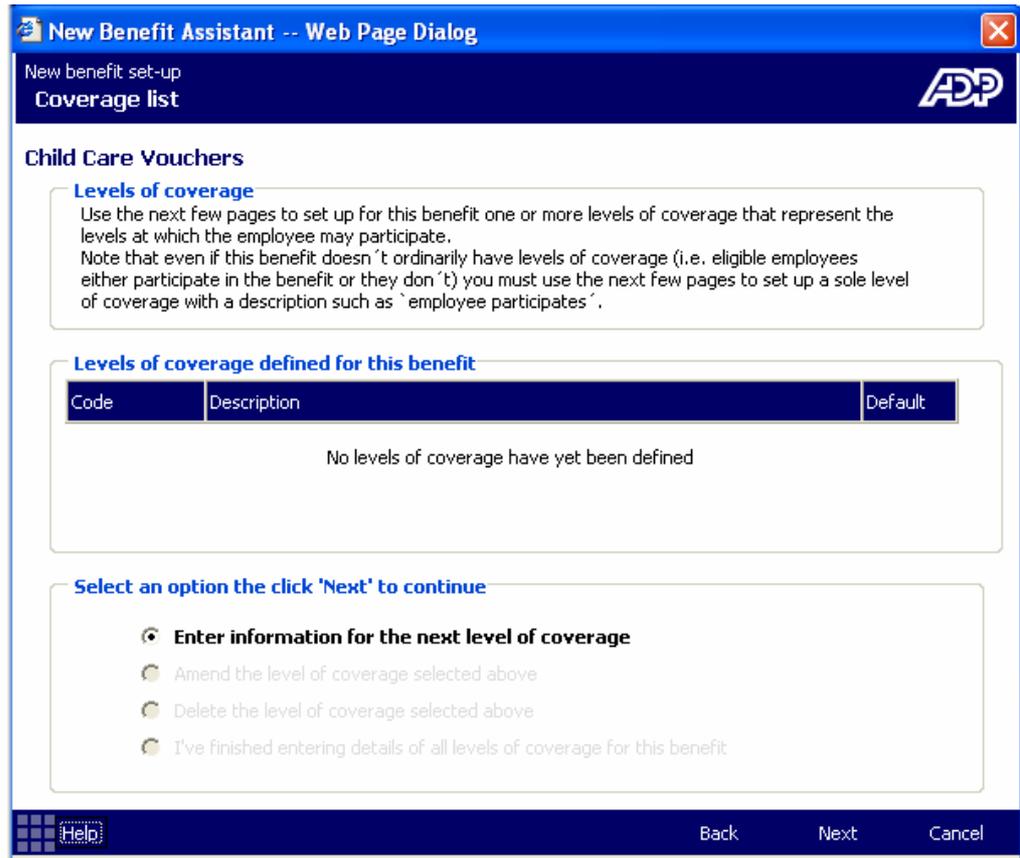


Figure 1 - 41 Benefits Setup Assistant – Other type benefit coverage list

As there are no levels of coverage currently available, the only option is to accept the default of **Enter information for the next level of coverage** and click **Next**.

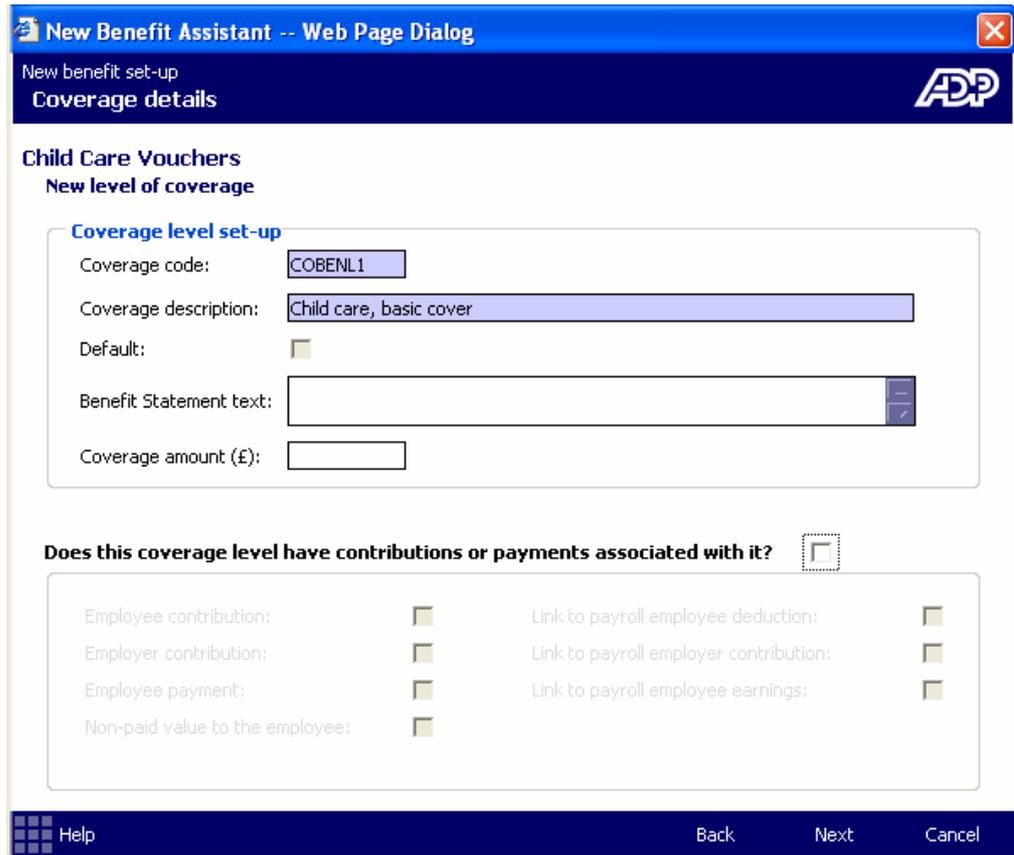


Figure 1 - 42 Benefits Setup Assistant – Other type coverage

Assistance in completing the other fields on this page can be gained from viewing the **Coverage details field descriptions**.

Once the required fields have been completed, clicking on the **Next** button will either return the assistant to **the Coverage List** where the user has the option of setting up further levels of coverage for this benefit, or, where the user has identified that there are costs associated with this benefit, the assistant will open the pages required to configure the relevant costs, refer to the section **Setting up employee contributions** onwards for details on how to complete the contributions pages.

Alternatively, the user can select **I've finished entering details of all levels of coverage for this benefit** where clicking **Next** will provide the user with configuring the opt-out options.

If there is a requirement to configure an opt-out, refer to the [field descriptions table](#) for the opt-out page.

If there is no requirement to configure an opt-out, then leave the **Do you wish to record employee non-participation in this benefit?** check-box blank and click **Next** to proceed to the next stage of the process.

On completion of the Opt-out coverage the assistant has acquired all necessary information and clicking **Next** provides the user with the options either to **Save** the benefit, **Review** the details that have been entered, or to go **Back** and change some of the details that have been entered.

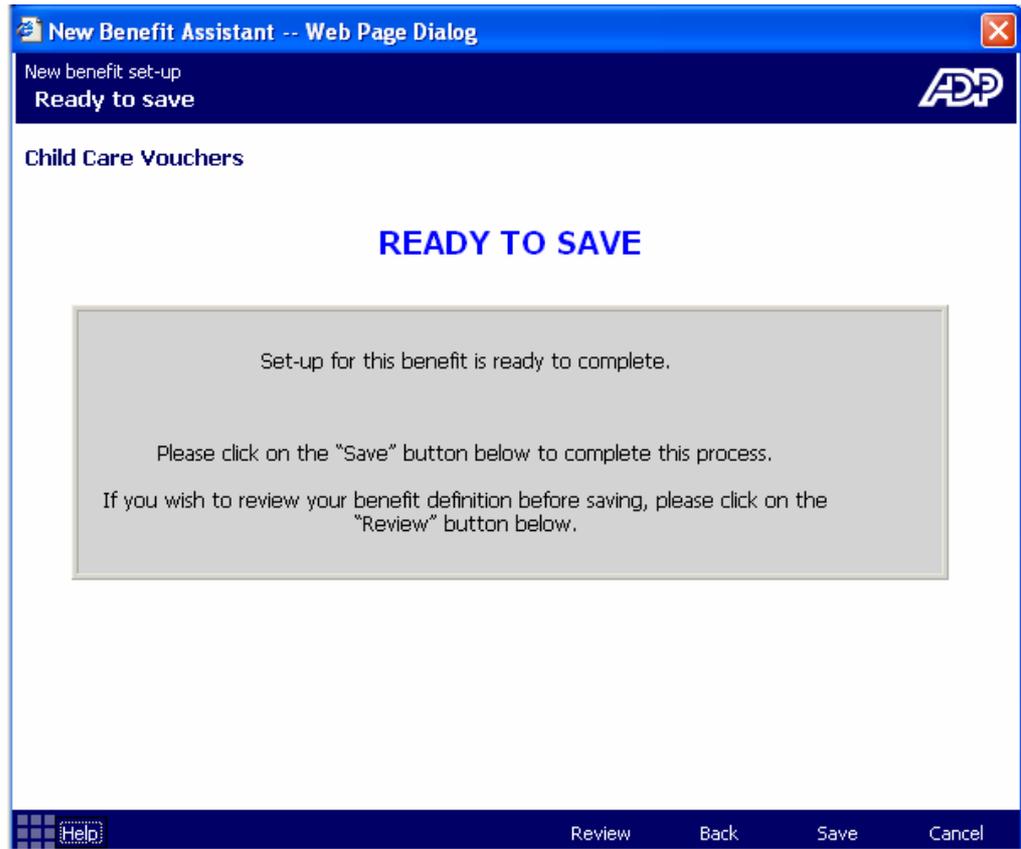


Figure 1 - 43 Benefits Setup Assistant – Saving or reviewing the benefit details

Reviewing the benefit details

If the user elects to review the benefit details, on clicking **Review**, the assistant opens up a benefit viewer page.

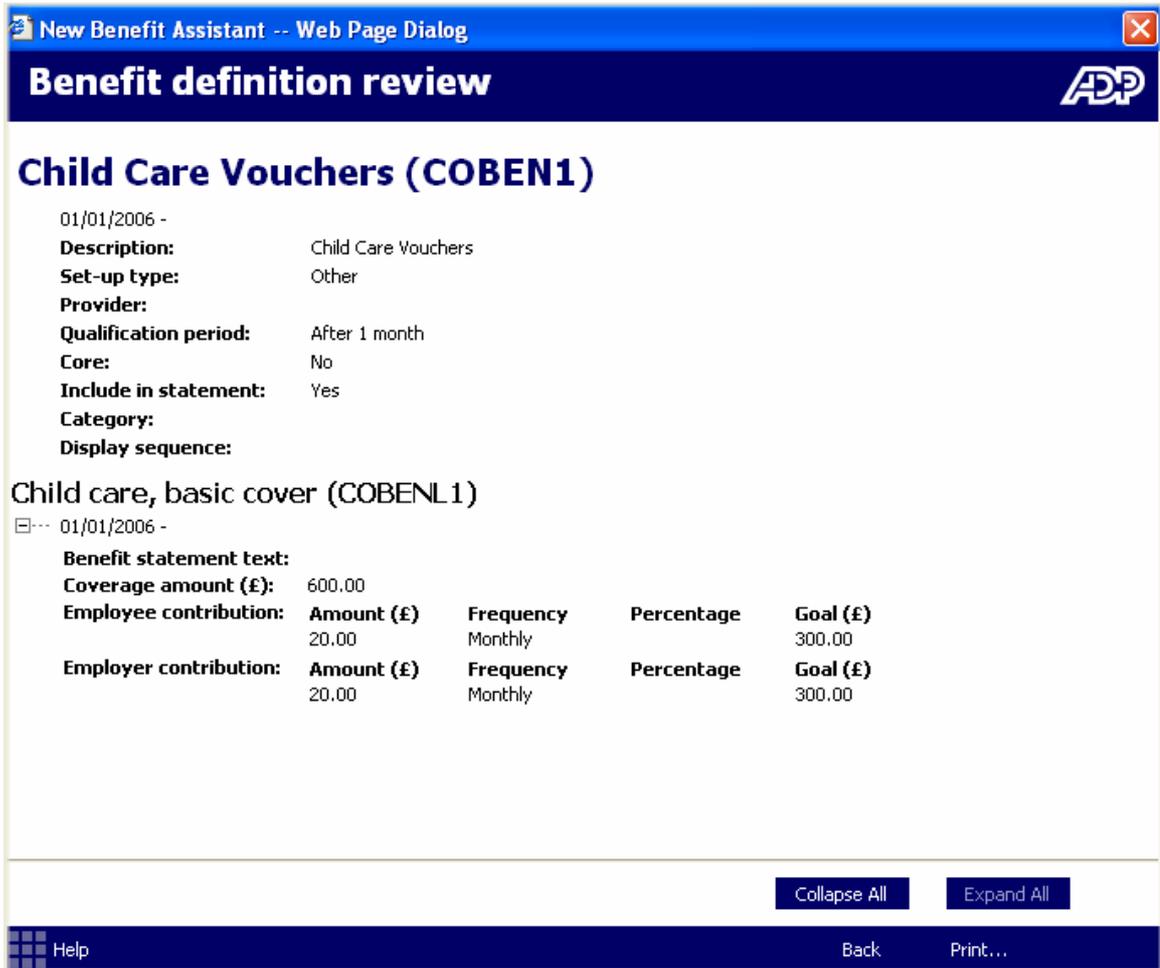


Figure 1 - 44 Benefits Setup Assistant – reviewing the Other type benefit details

This viewer allows the user to check the full details of the benefit but nothing can be changed from this page. The **Expand All** and **Collapse All** buttons provide the user with control over how much detail appears on the page. Selecting the **Print** option allows the user to print the details to a local printer. The details will always be printed in the **Expand All** mode.

Note: The details of this benefit have not been saved yet, to save the benefit, or to change any of the current details, click **Back**.

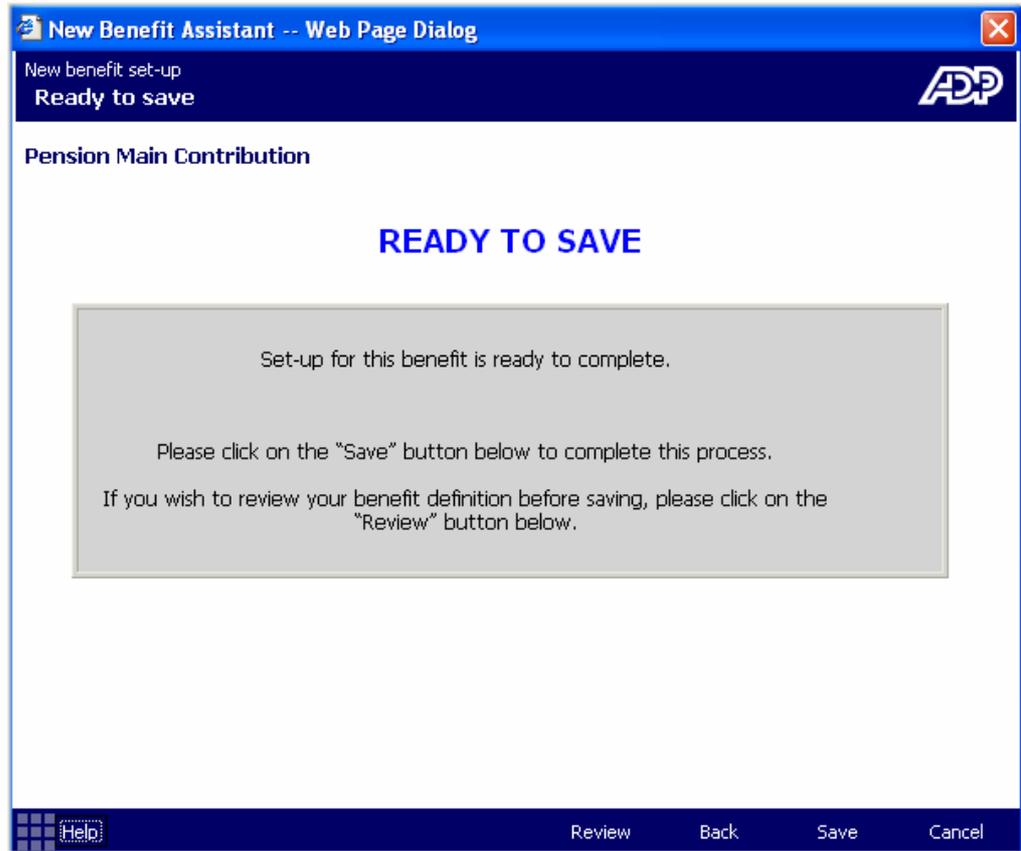


Figure 1 - 45 Benefits Setup Assistant – Saving the Other type benefit details

Saving the benefit details

Once the benefit details have been reviewed and the user is satisfied that the details are correct, then clicking **Save** will transfer the details to the ADP freedom database. A confirmation message is displayed, from here you can either re-start the assistant to create another new benefit, or, click **Close** to end the benefit set-up process.

Chapter 1 Creating Employee Benefits

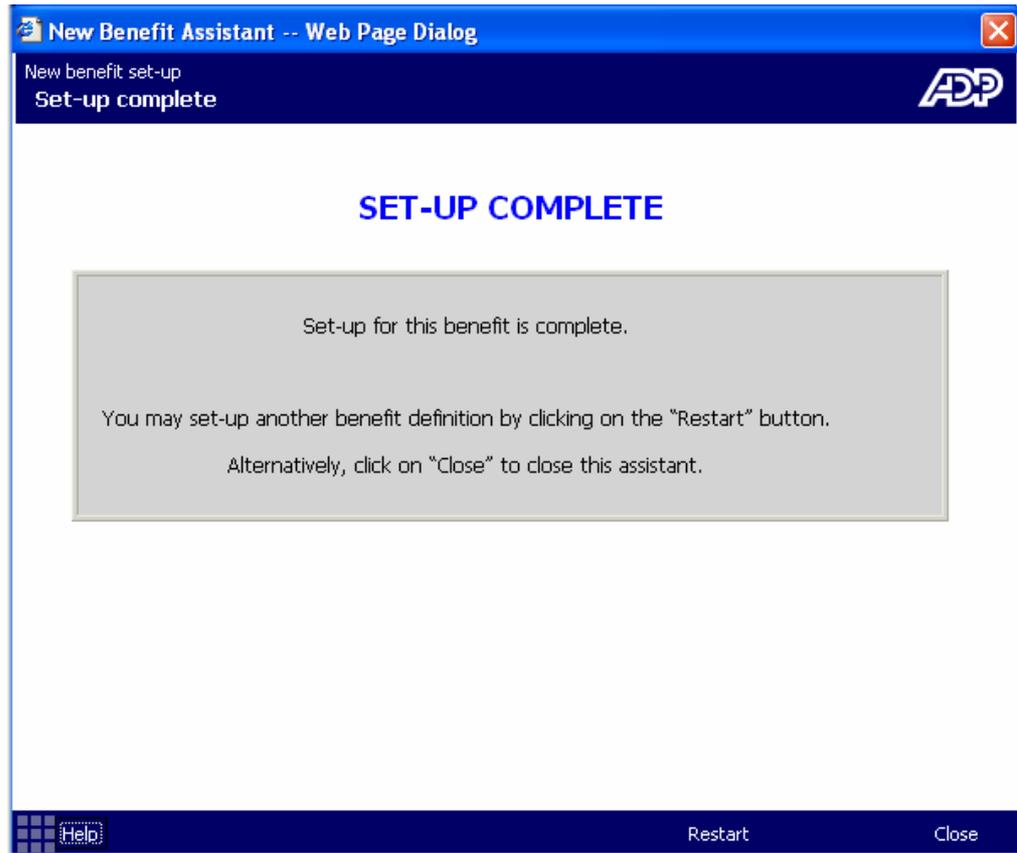


Figure 1 - 46 Benefits Setup Assistant – Set-up complete

Chapter 2 –Benefit plans

A benefit plan is a fast track means of associating an employee with multiple benefits. For ease of use, when taking on a new employee they may be assigned a benefit plan, and hence automatically be assigned the benefits that are in the plan.

It is not the only way to assign a benefit to an employee. An employee can be assigned a benefit individually or as part of a benefit plan.

A benefit may be free-standing, it need not be in any benefit plan, equally, a benefit may be in more than one benefit plan.

Creating benefit plans

To create benefit plans, select **Company > Benefits > Plans**.

Company - Benefits - Plan

-

Benefit plan code:

Benefit plan description:

Start date: End date:

Comments:

[Benefit mass update](#)

[Benefits](#)

Benefit Code	Name

Benefit:

Effective from: Effective to:

[Plan-level overrides](#)

[Core benefit](#)

Benefit: In this plan:

[Qualification period rule](#)

Benefit:

In this plan:

[Benefit mass update](#)

Figure 2 - 1 Create benefit plan

Chapter 2 Benefit Plans

Before individual benefits can be added to a plan, the plan must first be created and saved.

Table 2 - 1 Field Descriptions – Benefit plan

Field	Description
<p>Note: For a new benefit plan you must create and save the plan before adding individual benefits.</p>	
<p>Benefit plan code</p>	<p>Mandatory field. A unique, company defined, code identifying the plan. The code can be up to ten characters, including letters, numbers, hyphens and underscores.</p>
<p>Benefit plan description</p>	<p>Mandatory field. This is a user defined description for the benefit plan. The user can enter up to 40 alpha-numeric characters.</p>
<p>Start date</p>	<p>Mandatory field. The date on which the benefit plan is available for employee participation. Once employees are enrolled into the plan, this date cannot be changed to a date later than the date of the first enrolment.</p>
<p>End date</p>	<p>Normally left blank unless the plan is only to be in use for a specified period. Once a plan is to be taken out of use, then this field should be completed with the relevant date.</p> <p>Entering an end date for a plan that is in use will require individual employee benefit records to be updated with the same end dates for benefits that were in this plan. This is achieved by selecting the Start Mass Update button which becomes enabled once an End date is applied to the plan.</p>
<p>Comments</p>	<p>This field is a free form text field that allows the user to add further details relevant to this benefit plan. The field will accept up to 254 characters.</p>
<p style="text-align: center;">Benefit mass update</p>	
<p>Start Mass Update</p>	<p>This button is disabled until an End Date is entered for this plan. Once enabled and selected, the button triggers an update of all employee benefit records that are affected by the plan ending.</p> <p>The update process enters end dates for each individual employee benefit that was applied through this plan ensuring that when the plan ends, the employees who were receiving a benefit through this plan will no longer receive it.</p> <p>Once the Mass Update has been completed, ADP freedom will deliver a message to the Home page.</p>

<p>New Ben Plan</p>	<p>New benefit plans can be created from this page by selecting the New Ben Plan button from the foot of the page and then completing the following mandatory fields:</p> <ul style="list-style-type: none"> • Ben Plan code • Ben plan description • Start date <p>Once the above, mandatory, fields have been completed then the remaining fields can be completed with the relevant data. Refer to the on-line help if field assistance is required. Once all fields have been completed, the information can be saved by clicking the Save Ben Plan button.</p> <p>Note: Individual benefits cannot be added to a plan until the plan has been created and saved.</p>
<p>Delete Ben Plan</p>	<p>This button should only be used for plans that have been created in error. Plans that are in use, that is employees have been enrolled into the plan, cannot be deleted and, if necessary, the end date field should be used to discontinue the plan.</p>
<p>Cancel Changes</p>	<p>This button is used to cancel any changes that have been made to the page but have not yet been saved. The Cancel Changes button cannot undo changes that have already been saved.</p>
<p>Save Ben Plan</p>	<p>This button, when clicked, will perform some simple validation on the data that has been entered on the page and if all is well, the data will be saved to the database.</p> <p>If the validation discovers errors then a message, indicating the problem will be issued.</p>

Adding benefits to a plan

Once a benefit plan has been created, then individual benefits can be added to the plan. To add individual benefits to a benefit plan:

- Select **Company > Benefits > Plans**.
- For a new plan, create and save the plan using the above table for guidance, otherwise, select the relevant plan from the centre frame selection list.
- From the **Benefits** area of the page, select **New Benefit**.
- Complete the benefit fields, if necessary, use the table below for guidance.
- Save the benefit to the plan by clicking **Save Benefit**.

Table 2 - 2 Field Descriptions – Benefit

Field	Description
Benefit	This is a drop-down list that allows selection of any individual benefit that has been configured. Once a benefit is selected, individual benefit attributes, such as the Effective from date, are automatically completed for the fields on this page.
Effective from	Automatically populated from the details of the selected benefit.
Effective to	<p>If either the individual benefit, or the benefit plan have end dates then this field will default to the earlier of the two. If end dates are not present for either plan or benefit then this field will remain blank.</p> <p>If an Effective to date is entered manually then ADP freedom does validation checks and issues an explanatory message if the end date cannot be accepted.</p> <p>Once an Effective to date is entered manually, then this will require that the individual employee benefit records, that were in effect through this plan, to be updated with the same Effective to end date.</p> <p>This is achieved by selecting the Start Mass Update button which becomes enabled once an Effective to date is applied to the benefit within the plan.</p>
Plan Level overrides	
Core benefit	
Benefit	<p>This is automatically populated from the individual benefit details.</p> <p>Core benefits are those that are open to all employees and can be processed as automatic enrolments. If a benefit is core and automatic enrolments are used, then the system automatically assigns the benefit using the default level of coverage to every eligible employee.</p>
In this plan	Only benefits that are already identified as core can also be core in the plan. If a benefit is core, then the in this plan indicator also defaults to core, but this can be overridden if required.
Qualification period rule	
Benefit	Automatically populated from the individual benefit. This is the period of time that the employee has to have worked for

	the company before they are eligible for this particular benefit. Qualifying periods are configured from the Company > Company Setup > Lookups > Benefit Lookups > Benefit Qualifying Period table.
In this plan	Defaults to the qualification period for the individual benefit. If the above qualification period is to be overridden for this plan, then the user can select a different period from the drop-down list.
Benefit mass update	
Start Mass Update	This button is disabled until an Effective to date is entered for this benefit for this plan. Once enabled and selected, the button triggers an update of all employee benefit records that are affected by the benefit ending in this plan.
Action buttons	
New Benefit	This button is used to add additional benefits to an existing benefit plan.
Delete Benefit	<p>This button should only be used for benefits that have been added in error. Benefits that are in use within a plan, that is employees have already received this benefit through this plan, cannot be deleted.</p> <p>If necessary, the Effective to date field should be used to discontinue the benefit from within this plan. If the benefit's Effective to date is entered, then the Start Mass Update button should be used to ripple down the date to employee benefit records.</p>
Previous Benefit	<p>The Previous and Next options are navigation buttons that allow the user to select rows above or below the current selection in the grid.</p> <p>Details of the row that is currently selected will be displayed in the fields below the grid.</p>
Next Benefit	<p>The Previous and Next options are navigation buttons that allow the user to select rows above or below the current selection in the grid.</p> <p>Details of the row that is currently selected will be displayed in the fields below the grid.</p>
Cancel Changes	This button is used to cancel any changes that have been made to the page but have not yet been saved. The Cancel Changes button cannot undo changes that have already been saved.

Chapter 2 Benefit Plans

Save Benefit	This button, when clicked, will perform some simple validation on the data that has been entered on the page and if all is well, the data will be saved to the database. If the validation discovers errors then a message, indicating the problem will be issued.
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Additional benefits can be added to existing plans by selecting the **New Benefit** button and completing the appropriate fields, using the above table for guidance.

Chapter 3 – Enrolling employees into benefits and benefit plans

In order to assign benefits to employees, the benefit must first be configured at company level, see Chapter 1 for details of how to configure benefits at company level.

Note: *For employee benefit payroll transactions to be successful, it must be ensured that the employee’s pay group has the appropriate benefit earnings and deductions included and then those same earnings and deductions must be allocated to the employee on the **People > Payroll information > Earnings and People > Payroll information > Deduction and ER Contrib** pages.*

Configuring Pay Group Earnings and Deductions

Employees can only receive earnings and deductions that have been configured for use within their pay group. To make specific earnings available to a pay group, select **Company - Company Setup - Groupings - Earnings by Pay Group**, from the centre frame selection list, select the relevant pay group.

Company - Company Setup - Groupings - Earnings by Pay Group

EA Weekly (EAW)

Y/N	Earnings Code	Description
<input checked="" type="checkbox"/>	E1	Basic Pay
<input checked="" type="checkbox"/>	E4	Bonus
<input checked="" type="checkbox"/>	E5	Commission
<input checked="" type="checkbox"/>	B1	Course Fees

Select All

Proration

Applicable to:

Rule to be applied:

Availability

Disallow subsequent allocation to employees?

Time and Expense sheets

Display in Timesheets:

Display in Expense sheets:

Team TES:

Available for Time entry: Unit of input:

Available for Expenses entry: Upper limit warning:

Always show:

Previous Earnings Next Earnings Cancel Changes Save Earnings

Figure 3 - 2 Earnings by Pay Group

To make earnings available to the pay group, the Y/N check-box in the earnings grid should be selected for each required earning. Once an earning has been included for a pay group, then the field controls for that earning become enabled.

Chapter 3 Enrolling employees into benefits and benefit plans

Pay group deductions are configured in exactly the same way as earnings, other than there are no Time and Expense options to choose from.

Benefits can be assigned to employees at any time during their employment and when new starters begin their employment.

Making earnings available to employees

Note: An employee can only be assigned an earning that has been included in their payroll profile pay group. The earnings drop-down list will only provide a list of available earnings relevant to this employee.

In order for an earning to be paid, it must be assigned to each employee who is eligible to receive it. An earning can be assigned to an employee either by importing the earnings for all employees, or assigning the earning to individual employees on the **People > Payroll Information > Earnings** page.

People - Payroll Information - Earnings
CONTACT INFO

Franks, Wendy (EE193)

Effective From	Description	Amount	Rate	Status
02/06/2006	Basic Pay	£1500.00		Active
11/10/1991	Mileage			Active
11/10/1991	Relocation			Active
11/10/1991	Overtime 1 1/2 T			Active
11/10/1991	Overtime 2 T			Active
11/10/1991	Bonus	£30.00		Active

Earning: Basic Pay
Formula: Regular Pay
Type: General Earnings
Effective from: 02/06/2006
Effective to: dd/mm/yyyy
Status: Active
Amount: £ 1500.00
Rate: £
Quantity:
Annual limit: £
Table search:

Schedule Settings
First: Fourth:
Second: Fifth:
Third: Last:
Override settings:
All Regular Payrolls

Special Payrun Settings
Override schedule settings:
Generated in special payruns:

New Earning Delete Earning Previous Earning Next Earning Cancel Changes Save Earning

Figure 3 - 3 Employee Earnings page

Earnings are made available to this employee by clicking on the **New Earnings** button at the foot of the page, selecting the earning from the drop-down list and completing the relevant field options on the page. For assistance in completing the field options, refer to the on-line help.

Deductions are made available in exactly the same way as earnings.

Applying benefits for new starters

Via Launch New Starter

As part of the new starter HR Registration process, benefit plans can be assigned to new employees.



Figure 3 - 1 New starter process- Assign benefit plan

Assigning a benefit plan for new starters is an optional process but it would make sense, if the company provides a benefit package for all employees, to assign relevant plans at this stage. The option to assign a plan through new starter is the final part of the HR registration process.

Once the **New Starter Appointment Details** page has been completed, the user has the option of either closing the assistant, or assigning a benefit plan, if the user elects to assign a benefit plan they should select the down arrow, as shown in Figure 3 - 2 below.

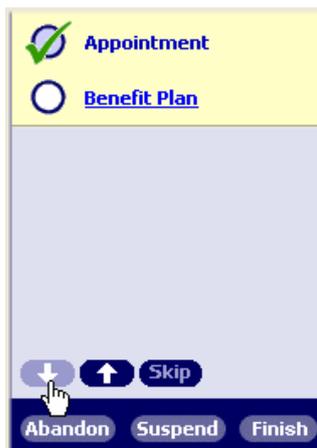


Figure 3 - 2 New starter process- Electing to assign a benefit plan

Once the down arrow is selected, the assistant opens the **Benefit Plan** page.

Chapter 3 Enrolling employees into benefits and benefit plans

People - Employment - Benefit Plan

Jones, Harry (108)

Plan:

Start date:

End date:

Notes

Cancel Save & Continue

Figure 3 - 3 Benefit Plan page -New starter

Complete the **Benefit Plan** page, if necessary refer to the field definition table below for assistance, and select **Save and Continue** to commit the details to the ADP freedom database.

Table 3 - 1 Field Descriptions – Benefit Plan

Field	Description
Plan	Mandatory field. This drop-down list allows the user to select a plan from the complete list of plans that have been configured for the organisation.
Start date	Mandatory field. The date that the benefit plan starts for this employee must be on, or later than: <ul style="list-style-type: none"> The start date of the employee’s employment. The start date of the benefit plan itself.
End date	May be left blank, but if a date is entered then it must be earlier than the end date, if one exists, of the actual benefit plan itself. If this field is left blank and the actual benefit plan does have an end date, then on saving the page ADP freedom will populate this field with the recorded end date of the benefit plan.
Notes	This is a free form text box in which users can enter information that is relevant and useful for this particular page. The field will accept up to 254 characters.
Cancel	This button is used to cancel any changes that have been made to the page but have not yet been saved. The Cancel button cannot undo changes that have already been saved.
Save and Continue	Clicking this button will commit the plan details to the ADP freedom database, the user can then elect to close the New Starter Assistant or to go back and amend some previous

	details.
--	----------

Via Quick Start

Benefits can be applied to new starters via the **Quick Start** menu route in the same way as they were through the **Launch New Starter** menu route. With the **Quick Start** process, benefits are configured immediately after setting up the employee's payroll profile.



Figure 3 - 4 Allocating benefit plans through the **Quick Start** process

Once selected, the process of allocating a benefit plan through the **Quick Start** option is the same as through **New Starter**.

A screenshot of a 'Benefit Plan' configuration page. The title is 'People - Employment - Benefit Plan' and the employee name is 'Price, Vincent (109)'. The 'Plan' dropdown menu is set to 'Generic plan for new starters'. The 'Start date' is '03/03/2006' and the 'End date' is 'dd/mm/yyyy'. There is a 'Notes' text area below. At the bottom right, there are 'Cancel' and 'Save & Continue' buttons.

Figure 3 - 5 Benefit Plan page –Quick Start

Chapter 3 Enrolling employees into benefits and benefit plans

Complete the **Benefit Plan** page, if necessary refer to the field definition table below for assistance, and select **Save and Continue** to commit the details to the ADP freedom database.

Table 3 - 2 Field Descriptions – Benefit Plan through Quick Start

Field	Description
Plan	Mandatory field. This drop-down list allows the user to select a plan from the complete list of plans that have been configured for the organisation.
Start date	Mandatory field. The date that the benefit plan starts for this employee must be on, or later than: <ul style="list-style-type: none">• The start date of the employee's employment.• The start date of the benefit plan itself.
End date	May be left blank, but if a date is entered then it must be earlier than the end date, if one exists, of the actual benefit plan itself. If this field is left blank and the actual benefit plan does have an end date, then on saving the page ADP freedom will populate this field with the recorded end date of the benefit plan.
Notes	This is a free form text box in which users can enter information that is relevant and useful for this particular page. The field will accept up to 254 characters.
Cancel	This button is used to cancel any changes that have been made to the page but have not yet been saved. The Cancel button cannot undo changes that have already been saved.
Save and Continue	Clicking this button will commit the plan details to the ADP freedom database and progress the assistant to the next stage of the new starter process, that of setting up the Appointment page.

Applying benefits for existing employees

Benefits are applied to existing employees via the menu route of **People > Employment > Benefits**.

From the centre frame pick-list, select the employee who is to have the benefit applied.

After selecting an employee additional filtering can be applied to specify the type of records that appear in the grid for that employee.

Selection filters

Table 3 - 3 Field Descriptions – Centre frame pick-list filters

Filter Selection	Result in Grid
TODAY	Displays all records where employee is entitled at today's date.
PAST	Displays all records with entitled dates up to and including yesterday's date.
FUTURE	Displays all records with entitled dates from tomorrow's date onwards
ALL	Displays all records for that employee. This is the default setting.
 	Displays all records within a specified date range.

Once the employee and appropriate filters have been selected, then the **Benefits** page is displayed.

People - Employment - Benefits
Bert, William (EE177)

Benefit	Status	Start Date	Additional Benefit

Show Benefit Detail Show Benefit Statement

Entitled date: 02/05/2006

Benefit: save as you Earn

Start date: 02/05/2006

End date: dd/mm/yyyy

Additional benefit:

Current status:

Notes:

New Benefit Delete Benefit Previous Benefit Next Benefit Cancel Changes Save Benefit

Figure 3 - 6 Employee benefit page

Complete the fields on the page, if necessary use the field description table for assistance.

Chapter 3 Enrolling employees into benefits and benefit plans

Table 3 - 4 Field Descriptions – Employee benefit page

Field	Description
Show Benefit Detail	Initially disabled until at least one benefit has been configured for this employee. Once there are benefits in the grid then this button can be selected to view the full details of the selected benefit. Employee benefit details can be amended from this option.
Show Benefit Statement	Initially disabled until at least one benefit has been configured for this employee. Once the employee has had benefits applied, then this button can be selected to view a summary of the range of benefits for this employee. See Chapter 4 for more information.
Entitled date	The entitled date is the date on which the benefit is available for employee participation. Although an employee is entitled to a benefit from this date it might not necessarily be the actual start date, for example there may be a qualification period attached to this benefit of say, 3 months, if the employee has only served two months then they would have to wait a further month before the benefit began.
Benefit	This is the name of the actual benefit that is selectable from the drop-down list.
Start date	This is the actual date that the benefit starts, it may be the same as the Entitled date but if an employee had not been employed for any qualification period that has been specified for the benefit then the start date would reflect this.
End date	The end date field allows the user to manually close a benefit for the selected employee.
Additional benefit	<p>This check-box is maintained by the system cannot be changed manually.</p> <p>If the benefit is not part of a benefit plan, then the Additional benefit field will be checked and the grid will display Yes. If the benefit is part of a plan then the Additional benefit field will remain unchecked and the Additional benefit cell in the grid will remain blank.</p>
Current status	<p>The current status is reflected by the following conditions:</p> <ul style="list-style-type: none"> • Active: - If the benefit Start date is either today or in the past, and the benefit end date is either in the future or blank.

Chapter 3 Enrolling employees into benefits and benefit plans

	<ul style="list-style-type: none"> • Pending: - If the benefit Start date is in the future. • Declined: - If the employee was entitled to this benefit but has chosen to opt out. • Pending declined: - If the benefit Start date is in the future and the employee is entitled to this benefit but has chosen to opt out. • Inactive: - If the benefit End date is in the past. • Entitled – Not yet elected: - If the employee is entitled to the benefit but the benefit details page has not been configured with effective dates. The employee will not receive the benefit until the effective dates have been entered.
Notes	This is a free form text box in which users can enter information that is relevant and useful for this particular page. The field will accept up to 254 characters.
New Benefit	Used to add a new benefit for this employee.
Delete Benefit	This button should only be used for benefits that have been added in error. If necessary, the End date field should be used to discontinue the benefit for this employee.
Previous Benefit	The Previous and Next options are navigation buttons that allow the user to select rows above or below the current selection in the grid. Details of the row that is currently selected will be displayed in the fields below the grid.
Next Benefit	The Previous and Next options are navigation buttons that allow the user to select rows above or below the current selection in the grid. Details of the row that is currently selected will be displayed in the fields below the grid.
Cancel Changes	This button is used to cancel any changes that have been made to the page but have not yet been saved. The Cancel Changes button cannot undo changes that have already been saved.
Save Benefit	This button, when clicked, will perform some simple validation on the data that has been entered on the page and if all is well, the data will be saved to the database.

	If the validation discovers errors then a message, indicating the problem will be issued.
--	---

Selecting coverage levels

If, once an employee’s benefits have been configured, the benefit grid displays a status of **Entitled – Not yet elected**, then the employee will not receive the benefit until the details are configured with effective dates.

Benefit	Status	Start Date	Additional Benefit
Private Health For Managers	Entitled - not yet elected	02/02/2006	
Benefit Company Vehicle	Entitled - not yet elected	01/01/2006	

Entitled date:

Figure 3 - 7 Benefit not yet elected

Clicking on the **Show Benefit Detail** button will open the **Benefit Detail Assistant**.

Employee participation	Effective from	Effective to	EE Contribution	ER Contributor	EE Payment	EE Value
<input type="text"/>	<input type="text" value="dd/mm/yyyy"/>	<input type="text"/>				

Figure 3 - 8 Benefit Detail Assistant

Click the **New** button to select the benefit coverage level for this employee. From the **Employee participation** drop-down list, select the coverage level that applies to this employee and complete the effective date fields.

Chapter 3 Enrolling employees into benefits and benefit plans

Employee Benefit Detail Assistant -- Web Page Dialog

Benefit details: Private Health For Managers
Benefit for Burgess, Mclean (105)

Employee participation	Effective from	Effective to	EE Contribution	ER Contributor	EE Payment	EE Value
Married No Children	02/02/2006	dd/mm/yyyy	25.00			

Employee participation: Married No Children

Effective from: 02/02/2006 Effective to: dd/mm/yyyy

Employee contribution

Amount (£): 25.00 Frequency: Monthly

Percentage: Goal (£):

Employer contribution

Amount (£): 50.00 Frequency: Monthly

Percentage: Goal (£):

Change benefit detail

Help Cancel new Delete Save Close

http://bmsukqaws2.freedom.bms.uk.com/coreAssistantFrame.asp?AssistName=EEBenefitDetail&T Internet

Figure 3 - 9 Benefit Detail Assistant – Select coverage

The contribution fields will automatically show the default amounts that were configured for this benefit, but these can be overwritten if required. Once the page details have been entered then the **Save** button can be selected to commit the information to the ADP freedom database.

Once saved, if required, the details can still be amended by selecting **Change Benefit Detail** button.

Once the details have been configured satisfactorily then clicking the Close button will close the assistant and return the user to the **Benefits** page. The **Refresh** button should now be selected to update the status of the benefit.

Chapter 3 Enrolling employees into benefits and benefit plans

People - Employment - Benefits

Burgess, Mclean (105)

Benefit	Status	Start Date	Additional Benefit
Private Health For Managers	Active	02/02/2006	
Benefit Company Vehicle	Entitled - not yet elected	01/01/2006	

Entitled date:

Benefit:

Start date:

End date:

Additional benefit:

Current status:

Notes:

Figure 3 - 10 Updated benefit status

Individual benefits can be added as required, alternatively, multiple benefits can be added through benefit plans.

Applying benefits plans for existing employees

Benefits are applied to existing employees via the menu route of **People > Employment > Benefit plan**.

From the centre frame pick-list, select the employee who is to have the benefit applied.

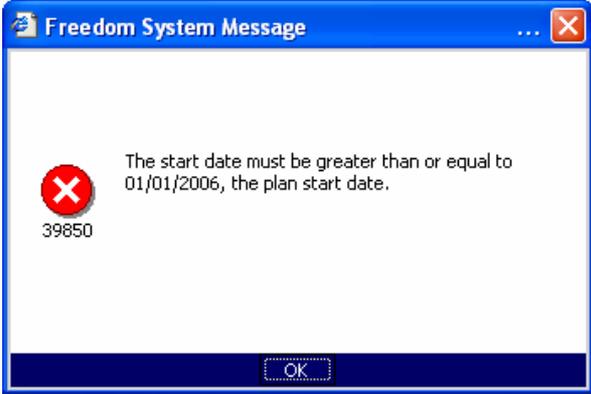
Once the employee has been selected, then the **Benefit Plan** page is displayed.

Chapter 3 Enrolling employees into benefits and benefit plans

Figure 3 - 11 Employee benefit plan page

Complete the fields on the page by referring to the field description table, below, if required.

Table 3 - 5 Field Descriptions – Employee benefit plan page

Field	Description
Plan	This is the name of the actual benefit plan that is selectable from the drop-down list.
Start date	<p>The start date defaults to the employee’s employment start date but should be overwritten with the actual date that the plan is to start for this employee. The date cannot be before the start date of the actual benefit plan itself, if such a date is entered then ADP freedom issues the following message:</p> 
End date	The end date field allows the user to manually close a benefit plan for the selected employee.
Notes	This is a free form text box in which users can enter information that is relevant and useful for this particular page. The field will accept up to 254 characters.

Chapter 3 Enrolling employees into benefits and benefit plans

New Benefit	Used to add a new benefit plan for this employee.
Previous Benefit	<p>The Previous and Next options are navigation buttons that allow the user to select rows above or below the current selection in the grid.</p> <p>Details of the row that is currently selected will be displayed in the fields below the grid.</p>
Next Benefit	<p>The Previous and Next options are navigation buttons that allow the user to select rows above or below the current selection in the grid.</p> <p>Details of the row that is currently selected will be displayed in the fields below the grid.</p>
Cancel Changes	This button is used to cancel any changes that have been made to the page but have not yet been saved. The Cancel Changes button cannot undo changes that have already been saved.
Save Benefit	<p>This button, when clicked, will perform some simple validation on the data that has been entered on the page and if all is well, the data will be saved to the database.</p> <p>If the validation discovers errors then a message, indicating the problem will be issued.</p>

Employees can be in more than one benefit plan, if required the user should add additional plans by clicking on **New Plan** and repeating the above procedure.

Chapter 4 –Benefit statements

The **Benefits Statement** is an online view of an employee’s benefit package built from those allocated employee benefits.

In addition to this online view, a report is available that provides a definition of employee benefits for a population of employees.

The **Benefits Statement** is based on benefits as at the date of submission and displays all benefits that are active for an employee. Active includes:

- Benefits for which an employee has opted out.
- Benefits that an employee is eligible for, but has not yet taken up.
- Pending benefits are under a separate heading. In this case no values will be displayed.

To view the Benefit Statement for an employee, from the main menu options select **People > Employment > Benefits**.

From the centre frame pick-list, select the employee who is to have the benefit applied.

After selecting an employee additional filtering can be applied to specify the type of records that appear in the grid for that employee.

Selection filters

Table 4 - 1 Field Descriptions – Centre frame pick-list filters

Filter Selection	Result in Grid
	Displays all records where employee is entitled at today's date.
	Displays all records with entitled dates up to and including yesterday's date.
	Displays all records with entitled dates from tomorrow's date onwards
	Displays all records for that employee. This is the default setting.
	Displays all records within a specified date range.

Once the employee and appropriate filters have been selected, then the **Benefits** page is displayed.

Chapter 3 Benefit statements

People - Employment - Benefits

Crew, Norma (EE196)

[CONTACT INFO](#)

Benefit	Status	Start Date	Additional Benefit
Benefits, Employee Leave Pl	Active	02/02/2006	
Benefit Generic pension	Active	02/02/2006	
Private Health Insurance	Entitled - not yet elected	02/02/2006	

[Show Benefit Detail](#) [Show Benefit Statement](#)

Entitled date:

Benefit:

Start date:

End date:

Additional benefit:

Current status:

Notes:

[New Benefit](#) [Delete Benefit](#) [Previous Benefit](#) [Next Benefit](#) [Cancel Changes](#) [Save Benefit](#)

Figure 4 - 1 Employee benefit page with Show Benefit Statement button

From the details area of the page, select Show **Benefit Statement**.

Chapter 3 Benefit statements

O'Toole Garden Furniture							
Statement of Current Benefits for Michael Adams as at 1st May 2006							
117 Halifax Rd Corby Northants CO9 3BL		NI number: BT590772A Date of birth: 14/1/1950 Start date: 10/09/1990		Business Unit: OTGF Research & Development Position: Senior Designer Grade: Line Manager Grade 2			
Active Benefits							
Benefit Category	Benefit	Details	Cost To You	Employer Contribution	Payment To You	Value To You	Entitled From
Pension	Personal pension	Company contribution of 10% of your basic pay, you are free to make additional contributions if you wish.	£159.00 monthly	£318.00 monthly			10/09/1990
Company Car	Company car *	Your company car is valued up to £28,000 and is renewable every 3 years				£3,000.00 annually	01/04/1999
Savings and Retirement	Sharesave approved scheme 57	3 year saving scheme with option to buy company shares 15% less than market price as at 01/6/2005.	£89.00 monthly				01/08/2005
	Sharesave approved scheme 56	3 year saving scheme with option to buy company shares 15% less than market price as at 01/6/2004.	£57.00 monthly				01/08/2004
	SAYE	You have chosen not to participate in this voluntary benefit.					10/09/1990
Health and Welfare	Medical Insurance *	Employee Plus Family		£555.00 annually		£555.00 annually	10/09/1990
	Dental Cover	You have chosen to participate in this voluntary benefit.	£13.00 monthly			£240.00 annually	01/01/2003
	Optical Services *	Company pays for annual sight check.				£10.00 annually	01/04/1996
Personal protection	Life Assurance	You have life cover that amounts to 3 times your annual salary.				£900.00 annually	10/09/1990
	PHI	Permanent Health Insurance to protect your income during illness.				£480.00 annually	01/01/1997

Figure 4 - 2 Employee benefit statement

The benefit statement can be printed out to a local printer by selecting the **Print** button.

In addition to the on-line Benefit Statement, ADP freedom provides a series of reports from where the user can view benefit details from the following perspectives:

- Analysis of Benefit Take-up
- Employee Benefit Changes within Period
- Employee Benefit Statement
- Employees by Benefit Plan

These reports can be run from the main menu option of **Reports > Run Report**, and then selecting **Benefits** from the centre frame drop-down list.